CONTRACT LIFECYCLE MANAGEMENT
USER HANDBOOK

PRODUCT VERSION 16.2

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WELCOME

Objectives

The purpose of this handbook is to familiarize users with tasks related to Contract Lifecycle Management in eMACS.

Understanding the Format

A **Lesson** is created for each major functional area of the system. Within each lesson, there are three sections:

- An overview of the goals and functions in the lesson.
- Background and conceptual information about the lesson. The concepts will help you better understand why and when you perform tasks in the system and how they relate to other parts of the system.
- Step-by-step instructions detailing specific tasks in the system. These instructions provide background information about the task, details about the typical user, step-by-step instructions, and in many cases, a results screen to compare your work.

Additional Training Resources

Additional eMACS training resources such as handbooks and training videos, can be found at http://emacs.mt.gov/.

As well, there is a Test environment available for eMACS where all users are encouraged to test and learn more about the various applications of eMACS. Listed below are the links to the eMACS Test sites.

Note: You cannot be in two eMACS applications at the same time using the same browser. You will need to use two different types of browsers (ie, Internet Explorer and Google Chrome) to do so.

Test ePass site: https://tst.mt.gov/epass/Authn/selectIDP.html

Click on the Login button under Login with State Employee Account
Login in using your State login information

SciQuest Vendor Portal Test (Chrome)
https://usertest.sciquest.com/apps/Router/SupplierLogin?CustOrg=StateOfMontana
User Name: emacs@mt.gov
Password: password

SciQuest Public Bid Site Test (Chrome)
https://usertest-bids.sciquest.com/apps/Router/PublicEvent?CustomerOrg=StateOfMontana

Need Help with eMACS?

Have questions on the information in this handbook? Need more information on eMACS? To ensure a timely response, email all questions or concerns about eMACS to emacs@mt.gov.

SEARCHING FOR CONTRACTS

If your agency manages a large number of contracts in eMACS, there are a few options to help you to locate the contracts you need:

- Search Contracts helps you to locate the contracts based on specific criteria. You can perform a simple search or you can perform an advanced search based on a more complex set of values.

- Saved Searches and View Saved Searches allow you to save search settings and organize saved searches in folders, share them, or export search results. Saved searches are useful if you use the same search criteria frequently and want to save contract search settings to use again, or export a limited set of records.

- The Contracts Dashboard provides quick access to key tasks and activities related to the administration of contracts from one location for users with the Contract Manager or Contract Administrator permission.

- The Contract Summary page provides a single location from which a user can view important contract information for one contract. Links to Contract Summary pages are often provided in search results and reports.

In addition, the following search screens can help you find attachments and contract parties:

- Use the Search Contract Attachments page to search for contract text and attachments (including attachment versions) to help find specific contract text or contract documents that you require. This page also allows you to search for obligation attachments.

- Use the Search Contract Parties page to search for companies that can be selected or listed as first or second parties on a contract. You can perform a simple search or an advanced search for contract parties.

SEARCH CONTRACTS

If your agency manages a large number of contracts, the Search Contracts page is key to locating the contracts you need. There are two ways to search, and which type to use depends on what you're looking for:

- Use Simple Search when you may not have all the information you need and want to search based on partial information. The system will search all contract fields for each keyword entered, providing you with a broad results set.

- Use Advanced Search when you have exact data or a complex set of values that you want to search for, e.g., you have a contract number, or want to apply multiple search filters to limit the number of search results. The system only returns results that are an exact match to the values entered.

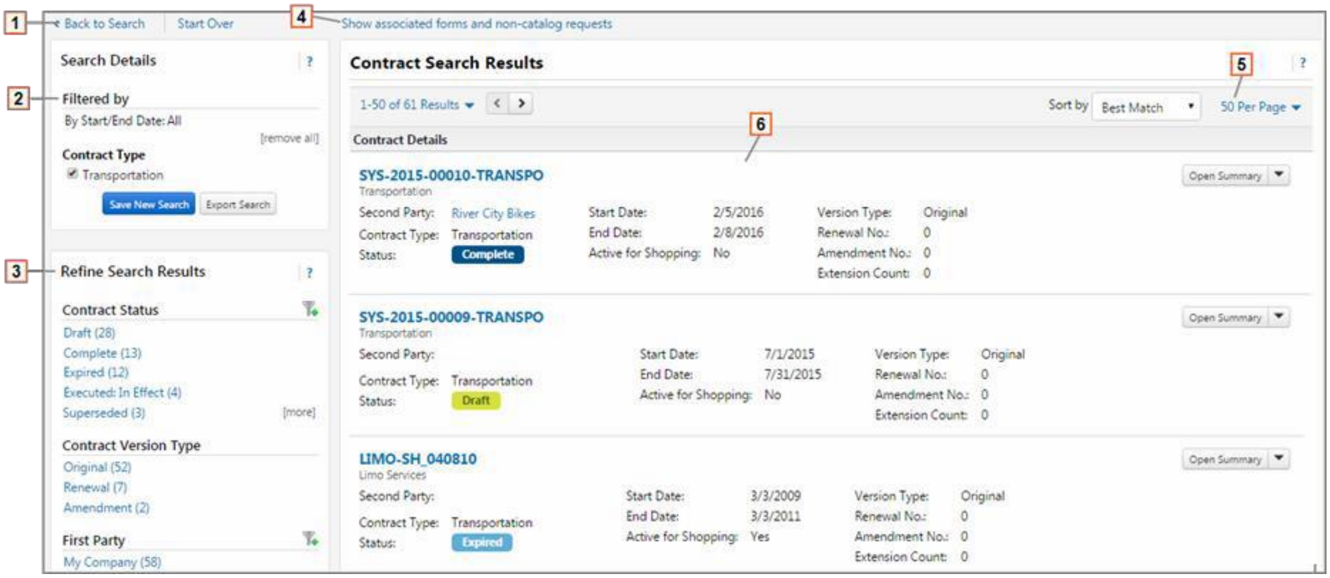
All users can search for contracts, but results and access will vary depending on your user permissions and system licenses.

If you often search for the same things, you can save your search settings in a saved search to use again. See Saved Search and View Saved Search for more information.

UNDERSTANDING THE SEARCH RESULTS

In order to quickly find the contract or contracts you need, it helps to understand the search results. The image below shows an example of the contract search results.

Note: Contracts that don't expire will display "No Expiration" in the End Date column on the Contract Search Results page. This is to distinguish them from contracts that are in Draft status and will not have an end date set until they are approved and active. Draft mode contracts that do not have start and end dates are indicated by a dash "-" in the Start Date and End Date fields on the Contract Results page.



1. Back to Search/Start Over

Selecting Back to Search will return you to the search page with all of your previous search criteria intact. Selecting Start Over takes you to a brand new search with no criteria entered.

2. Filtered by

This section displays the filters/values by which your search results are filtered. Initially, any search criteria you entered will be displayed. As you add filters, the Filtered by section will update to reflect the new filters. From this section, you can also remove a single filter by de-selecting the associated checkbox or click the remove all link to remove all the filters. The Export Search button allows you to export the search results.

3. Refine Search Results

Search results can be refined by using the post-search filters. Below each filter, the available values display. The number of contracts associated with that value displays beside the value. Click on a value to filter the search results. **Note:** The filters and values displayed will vary based on set up and your individual permissions.

4. Show associated forms and non-catalog requests

Click this link to expand the search results to reveal any associated agency forms and non-catalog requests.

5. Results Page Management Function

Several sort options are available in the Sort by drop-down menu. You can also control the number of search results displayed for each results page.

6. Contract Search Results

The search results display in a list and include the following information:

- **Contract No.** - The contract number. Click on the number to view the contract summary, open the contract for editing, view the associated items or shop from the contract. What you can do will depend on your permissions.
- **Contract Name** - The contract name.
- **Second Party** or **Vendor Name** - The second party or vendor on the contract, i.e., who the contract is with. **Note:** Click on the **name** to view information about the vendor or contract party, their contacts, and contact information.

- **Contract Type** - The contract type.
- **Status** - Indicates where the contract is in the contract workflow.
- **Start Date/End Date** - The start and end date of the contract.
- **Active for Shopping** - Yes or No indicates whether or not the contract is active for shopping.
- **Version Type** - Indicates whether the contract is the original contract, a renewal, or an amendment.
- **Renewal No.** - The number of times a contract has been renewed. A contract that has not yet been renewed is listed as 0.
- **Amendment No.** - The number of times a contract has been amended. A contract that has not yet been amended is listed as 0.
- **Extension Count** - The number of times the contract end date has been extended. A contract that has not yet been extended is listed as 0.

Contract Simple Search

Use **Simple Search** when you may not have all the information you need and want to search based on partial information. The system will search all contract fields for each keyword entered, providing you with a broad results set.

All users can search for contracts, but results and access will vary depending on your user permissions and system licenses.

Perform a Simple Search

STEP-BY-STEP

Note: Search filters use the type-ahead feature. Begin entering text in a field to search for and/or select available values.

1. Go to **Catalogs and Contracts > Contracts > Search Contracts**.
2. Click the **Simple Search** link in the top-right corner of the page if you are not on the Simple Search page.

Note: This link toggles between the Advanced and Simple Search pages. If you are on the Advanced Search page, you will only see a Simple Search link. If you are on the Simple Search page, you will only see an Advanced Search link.

3. Enter search criteria by completing the following fields:

- **Contract** - Enter data such as contract name, description, etc. in the field. The system will search all contract fields for each keyword entered, providing you with a broad results set.
- **Active for Shopping** - Filter by the contract's shopping status. The choices are All, Active or Inactive.
  Note: Selecting **All** will return a greater number of search results, including contracts in Draft status.
- **By Start/End Date** - Search based on when the contract is active. The options are: All, Effective, Expired, Future, No Expiration, Custom. The system will compare the start/end dates entered on the contract to the current date and return the appropriate results for all options except Custom. Selecting **Custom** will open up additional **Start Date between** and **End Date between** fields, where you can enter the contract start and end dates to search for.

4. Click the **Search** button to view your results.

Contract Advanced Search

Advanced search allows you to enter complex search criteria for a narrow results set. Use advanced search when you have exact data or a complex set of values that you want to search for, e.g., you have a contract number, or want to apply multiple search filters to limit the number of search results. The system only returns results that contain an **exact match** to the values entered.

All users can search for contracts, but results and access will vary depending on your user permissions and system licenses.

Perform an Advanced Search

Enter information in one or more fields to search for contracts based on that criteria. Leaving a field blank will return all results for the field, for example, all contract types. Some search filters use the type-ahead feature. For these fields, begin entering text in a field to see a list of values that match the text, or click the search icon to see a list of all the values that you can select.

STEP-BY-STEP

1. Go to **Catalogs and Contracts > Contracts > Search Contracts**.

2. Click the **Advanced Search** link in the top-right corner of the page if you are not on the Advanced Search page.

Note: This link toggles between the Advanced and Simple Search pages. If you are on the Advanced Search page, you will only see a Simple Search link. If you are on the Simple Search page, you will only see an Advanced Search link.

3. Enter search criteria in the following fields as needed. The information must be exact; for example, you need the complete contract number. If you have only partial data, use a simple search. **Note:** General search filters are displayed at the top of the page, with sub-sections that can be expanded to add more search information listed below. The fields and sections displayed will depend on your system settings. Expand the items below to see a list of filters and sub-sections that appear by default:

General Search Filters

- **Contract Number** - Enter an exact contract number.
- **Contract Name** - Enter a contract name.
- **Keywords** - Enter keywords for the contract.
- **Contract Type** - Select one or more contract types.
- **Internal Contract Status** - Select an internal contract status.
- **Contract Status** - Select one or more contract statuses.
- **Contract Version Type** - Search by contract version, i.e., original contracts, renewals or amendments.
- **Contract Manager** - Select one or more contract managers.
- **Second Party** - Search for contracts where the specified contract parties in the search filter are second parties on contracts. Select the **Any Of** radio button if any one of the values in the search filter can be second parties on the contract. Select the **All Of** radio button if all of the values in the search filter must be second parties on the contract. This will return fewer search results.
- **Project** - Select one or more projects.

- **By Start/End Date** - Search based on when the contract is active. The options are: All, Effective, Expired, Future, No Expiration, Custom. The system will compare the start and end dates entered on the contract to the current date and return the appropriate results for all options except Custom. Selecting **Custom** will open up additional **Start Date between** and **End Date between** fields, where you can enter the contract start and end dates to search for.

- **Contract Term Extended** - Select whether you are looking for only for contracts that have had its end date extended or contracts where the end date has not been extended. Leave the field blank to return both extended and non-extended contracts.

- **Include Archived** - Select Yes to include archived contracts in the results. No is the default setting.

- **Reporting Commodity Codes** - Select one or more commodity codes. By default the search only looks at reporting commodity codes on contracts. Select the **Include Additional Commodity Codes** checkbox to include additional commodity codes in the search.

Sub-Sections

- **Contract Party Options**

- **First Party** - Search for contracts where the specified contract parties in the search filter are first parties on contracts. Select the **Any Of** radio button if any one of the values in the search filter can be first parties on the contract. Select the **All Of** radio button if all of the values in the search filter must be first parties on the contract. This will return fewer search results.

- **Primary Second Party Class** - Search by the primary second party's classification as entered on their contract party profile, for example, all contracts where the primary second party is classified as a preferred vendor. For more information on this subject, contact the eMACS Support Unit, emacs@mt.gov.

Note: A white star appears next to the primary owner profile, indicating that they are the default first party on contracts.

- **Custom Contract Fields** - Search for contracts based on custom fields added to contract types.

- **Renewal** - Search for contracts based on their renewal settings (Auto-Renew, Will Not Renew).

- **eProcurement** - Search for contracts based on their status in the eProcurement process. You can search by the contract's shopping status (Active, Inactive or All). The default is set to All. For example, you can search for contracts that are automatically applied to purchases and for contracts that are active for shopping. You can search by budget status (approaching or exceeding budget) and by price set information. In addition, you can search by Tier Notification information.

- **Applies To** - Search for contracts based on the agency business unit or department to which the contract applies.

- **Status Flags** - Click the **With Errors** checkbox to filter for contracts with status flags that identify records with errors.

4. Click the **Search** button to view your results.

Export Search Results as a Report

Simple or advanced search results can be saved as a report, in a CSV or XLS (Excel) format.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts**.

2. Select and generate the **saved search** that you want to report on.

3. Click the **Export Search** button in the left menu. The Export Search window opens.

4. Enter a **description** of the search. The description can be up to 100 characters.

5. Select a **format** for the report in the Action field. The options are Excel Export (.xls) and CSV Export (.csv).

6. Select the **Include Custom Fields in Export** checkbox if you want custom fields (of the type single line text, multi-line text, numeric text, yes/no, date, multi-select and drop down) from the contract included in the report. This option is not available if the CSV format is selected.

7. Click **Submit.** The Export Submitted window opens.

8. Click **Go to Page: Download Export Files**. The Contract Import/Export Results window opens.

9. Click on the **file name** to open and save the file to your local drive.

SAVED SEARCHES

If you search for the same things frequently in the Search Contracts page, you can save the search settings to use again. These are called saved searches. Once you create a saved search you can link to it from other pages in the system, share it or export search results. There are many places where saved searches are used:

CREATE AND UPDATE SAVED SEARCHES

Saved searches are created and updated in the **Search Contracts** page:

- See Search Contracts for information on searching for contracts.
- See Create a Saved Search for instructions on how to create a saved search.
- See Update a Saved Search if you want to change saved search settings.

VIEW AND MANAGE SAVED SEARCHES

Saved searches are managed in the **View Saved Searches** page. This is where you can edit saved search properties, control shortcuts and manage saved search folders.

Instructions for these tasks can be found on the View Saved Searches page.

OTHER LINKS TO SAVED SEARCHES

Other ways saved searches can be used are:

- It can be added as a widget to a personal or agency dashboard.
- A quick link to View Saved Searches is available on the contracts dashboard.

Create a Saved Search

If you search for the same things over and over again in the Search Contracts page, you can save the search settings for future reference. These are called saved searches. Once you create a saved search you can link to it from other pages in the system, share it or export it.

Saved searches are created and updated from the **Search Contracts** page, but they are viewed and managed in the **View Saved Searches** page. See Search Contracts, Saved Searches and View Saved Searches for more information.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts**.

2. For either a simple or advanced search, enter your search criteria and click the **magnifying glass icon** or **Search** button so that the search results page opens. See Search Contracts for details.

3. In the left menu, click **Save New Search**. The Add to Saved Searches window opens.

4. Enter a **nickname** for the search. This is the name that will identify the search.

5. (optional) Expand the **Add Description** link and type a description of the search. The description can be up to 500 characters long.

6. Select the **Personal** or **Shared** folder that you want to save the search in.

> **Note:** You can create a folder by clicking **Add New**, entering a **name** for the folder, and defining access to it. See View Saved Searches for more information on folders.

7. Click **Save**. The search is saved to the folder.

8. Access the search by navigating to **Catalogs and Contracts > View Saved Searches**.

View Saved Searches

Saved searches are viewed and managed in the **View Saved Searches** page. This is where to:

- Run a saved search.
- Add saved search shortcuts to the Search Contracts page.
- Manage saved search folders. This includes creating and updating folders and setting security access for saved searches in shared folders.
- Add searches, edit saved search properties, move searches to another folder, or delete saved searches.
- Export saved search results as an Excel or CSV file for reporting, or exporting and importing contract data.

SAVED SEARCH FOLDERS

Every saved search must be saved in a folder. A saved search can be stored in a **Personal** folder, which means the saved search is only available to the user who created it. If you have the appropriate permission, you can also store saved searches in a **Shared** folder, where they can be accessed by other users in the agency. You can limit who can see searches in a shared folder through access settings on the folder.

Users have the option to create new folders when they are saving a search, but once created they are managed from the View Saved Searches page.

When creating shortcuts, saved searches in your personal folder will only be visible to you on the Search Contracts page. If the saved search is in a shared folder, only the users who have access as defined on the folder will see it on the Search Contracts page.

STEP-BY-STEP

Run a saved search from the View Saved Search page

1. Navigate to **Catalogs and Contracts > Contracts > View Saved Searches**.

2. In the left menu click the **folder** that contains the search.

3. Highlight the **saved search** you want to generate and click on the **search name** or click **Go**. The results are displayed in the Contract Search Results page.

Add or remove a saved search shortcut from the Search Contracts page

A saved search must exist before you can create a shortcut to it. Shortcuts appear under Saved Searches Shortcuts on the Search Contracts page, however they are managed from the View Saved Search page.

When creating a shortcut, if a saved search is in your personal folder, you are the only person who will see it on the Search Contracts page. If the saved search is in a shared folder, only the users who have access as defined on the folder will see it.

1. Navigate to **Catalogs and Contracts > Contracts > View Saved Searches**.

2. In the left menu click the **folder** that contains the search.

3. On the right, highlight the saved search and click **Add Shortcut** or **Remove Shortcut**.

4. Navigate to **Catalogs and Contracts > Search Contracts**. Your shortcut is added to or removed from the **Saved Searches Shortcuts** list on the left side of the Search Contracts page.

Create a folder

Every saved search must be saved in a folder. A saved search can be stored in a **Personal** folder, which is only available to the user who created it. If you have the appropriate permission, you can also store saved searches in a **Shared** folder, where they can be accessed by other users in the agency. You can limit who can see searches in a shared folder through access settings on the folder.

Users have the option to create new folders when they are saving a search, but they are managed from the View Saved Searches page, where folders can be created, edited, moved, copied or deleted. If you delete a folder, all favorites and subfolders will also be deleted. You can also set up a folder hierarchy by creating subfolders.
Subfolders acquire the settings of their parent folder.

1. Navigate to **Catalogs and Contracts > Contracts > View Saved Searches**.

2. In the left menu, click **Add New**, then choose the type of folder as follows:

- Select **Top level personal folder** if searches in the folder should only be available to you.
- Select **Top level shared folder** if you want other users to be able to use the saved search.
- Select **Subfolder of selected folder** if you want the new folder to be below the highlighted folder in the hierarchy (make sure you have the right folder highlighted).

3. Enter a **name** for the folder in the Name field.

4. (optional) Type a **description** of the folder under 254 characters in the Description field.

5. If you selected **Top level shared folder** in step 2, define who can access searches in the folder as follows:

- (optional) Select the checkbox next to **Allow Entire Agency (Read Only)** if anyone in your agency can view the search. They will be able to run the search, but they will only be able to view summary information in the search results. Leave the checkbox blank if the only access to the search is provided by the access settings below.
- Click Add Access and select whether you want to add access by Business Unit, Department, Role or User.

- Once you make your selection in the Add Access field, a second field is displayed where you need to **search for and select who will have access to the folder**. The field will vary depending on what is selected in the step above. For example, if you choose business units, the system displays the Select Business Unit field. If you select user, a user search opens. You can add multiple records for each access type – each time you select a record, it appears on a line below.

- For everyone who has access to the record, select the **type of access** they have. The person creating the folder automatically has Admin access by default:

- **Read-Only** - Users can view and copy searches, or add them as shortcuts to the Search Contracts page. They cannot move, edit or delete searches.

- **Editor** - Users can edit, move, copy and delete searches, but they cannot change folder settings

- **Admin** - Users can edit, move, copy or delete both searches and folders

Note: Click **remove** next to a record to delete it.

6. Click **Save Changes**.

Edit or delete a folder

You need administrator permissions to the folder to perform this task.

1. Navigate to **Catalogs and Contracts > Contracts > View Saved Searches**.

2. In the left menu click the **folder** you want to change.

3. Click **Folder Actions** in the top right corner of the screen and choose one of the following action items:

- Select **Edit** to change settings and update as needed.

- Click **Delete** to remove the folder. If you delete a folder all favorites and subfolders will also be deleted.

4. Click **Save Changes**.

Edit, move, copy or delete saved searches in a folder

You need edit permissions to the folder to perform this task.

1. Navigate to **Catalogs and Contracts > Contracts > View Saved Searches**.

2. In the left menu click the **folder** that contains the searches you want to change.

3. Choose one of the following action items for the search you want to change:

- Click **Edit** to change the name or description of the saved search, then make changes as needed.

- Click **Move** to move the search to another folder, then select the **folder** you want to move it into.

- Click **Copy** to make a copy of the saved search, then select the **folder** you want to copy the search into.

- Click **Delete** to delete the search.

> **Note:** If you want to perform the same action on multiple saved searches at once, click the checkbox on the right for each search you want to change, then select the action from the **Actions for Selected Favorites** field at the top of the column.

4. Click **Save Changes**.

Export saved search results as a XLS or CSV report from View Saved Search

Saved searches can be downloaded for reporting purposes, or for use when exporting and import contract data. The exported file can be in an XLS or CSV format. All standard contract fields are included in the downloaded report. For agencies with TCM, there is an additional option to include contract custom fields in the downloaded file.

Users with contract administrator and contract manager permissions can view all contract exports, including those performed by other users, in the Import and Export screen.

Note: You can also export searches directly from the Search Contracts screen. See Export Search Results as a Report.

1. Navigate to **Catalogs and Contracts> Contracts > View Saved Searches**.

2. In the left menu click the **folder** that contains the search you want to export

3. On the right, highlight the saved search and click **Export**. The Export Search window opens.

4. Enter a **description** of the search. The description can be up to 100 characters.

5. Select a **format** for the report in the Action field. The options are Excel Export (.xls) and CSV Export (.csv).

6. Select the **Include Custom Fields in Export** checkbox if you want custom fields (of the type single line text, multi-line text, numeric text, yes/no, date, multi-select and drop down) from the contract included in the report. This option is not available if the CSV format is selected.

7. Click **Submit.** The Export Submitted window opens.

8. Click **Go to Page: Download Export Files**. The Contract Import/Export Results window opens.

9. Click on the **file name** to open and save the file to your local drive.

Update a Saved Search

If you search for the same things frequently in the Search Contracts page, you can save the search settings to use again. These are called saved searches. Once you create a saved search you can link to it from other pages in the system, share it or export it.

Saved searches are created and updated from the **Search Contracts** page, but they are managed in the **View Saved Searches** page.

See Search Contracts, Saved Searches and View Saved Searches for more information.

STEP-BY-STEP

1. Access and run the saved search.

2. Change the parameters of the search in the **Refine Search Results** section on the Contract Search Results page.

3. In the **Filtered by** section on the left, click **Save Changes**.
4. Click **Yes** in the confirmation window.

Modified searches will display "Modified" next to the saved search name in View Saved Search.

CONTRACTS DASHBOARD

The **Contracts Dashboard** provides quick access to key tasks and activities related to the administration of contracts from one location. It can contain action items, a list of contracts up for renewal, and more. It is displayed to users with the appropriate permission when they navigate to the Contracts home page from the left menu (**Catalogs and Contracts > Contracts > Contracts Dashboard**).

A Contracts Dashboard supplied by SciQuest is displayed by default, but agencies can create their own versions and replace it.

PERMISSIONS

The **Contract Manager** permission is required to access the contracts dashboard.

Users will not see any content on the dashboard that they do not have access to. However, contract administrators who are editing a dashboard and do not have access to information within it will see a message indicating that they do not have access to the content.

DEFAULT CONTRACTS DASHBOARD

The default Contracts Dashboard that is provided by SciQuest contains basic information that allows you to view a summary of contract information in a graphic format, perform a contract search, use quick links and view contracts that have pending alerts. What you see on the Contracts Dashboard may be different if your agency has customized the dashboard. See View the Contracts Dashboard for more information on the default Contracts Dashboard.

CUSTOMIZING THE CONTRACTS DASHBOARD

Agencies can create custom versions of the Contracts Dashboard and make them available to users who have access to the Contracts home page. Agencies can define what information is displayed on a custom contracts dashboard by adding or removing widgets. They can also limit access through user roles and business units.

Agencies can create multiple custom versions of the Contracts Dashboard. When a custom version of the dashboard is published, the default dashboard is replaced with the customized version and this is what users will see (as defined by their permissions) when they navigate to the Contracts home page. In addition:

- If a user has access to the Contracts Dashboard through a Contract Manager or Contract Administrator permission, but does not have one of the specified roles or business units on a customized version, they will see the SciQuest default Contracts Dashboard.
- If a user has access to multiple custom dashboards, a **View Another Dashboard** link appears on the Contracts Dashboard page where they can choose a dashboard to view.

At any time, agencies can restore the system default dashboard by deleting or deactivating any customized dashboards.

View the Contracts Dashboard

The goal of this task is to access the dashboard for viewing and links to perform common tasks in the system. You need the **Contract Manager** permission to access the Contracts Dashboard.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Contracts Dashboard**. The Contracts Dashboard page opens.

2. The following information is displayed on the dashboard by default. What you see may be different if your agency has customized the dashboard:

- **Contracts Summary** - This is a bar graph that provides contract filter fields along the top so you can quickly view the number of contracts that meet the specified criteria. Drilling into the graph results will open the Contract Search Results screen, which lists all the contracts that match filter settings.

  For example, you can select an option in the **View Contracts By** to see contracts grouped by contract manager, contract type, or contract status, then click on a bar in the graph to view a list of those contracts.

- **Contract Search** - Use this field to find a contract by keyword. It displays the simple search option, where the system looks for contracts with information that is the same as or similar to the search term entered in the field, but there are also options to perform an advanced search and contract party search.

- **Quick Links** - Click on the appropriate link to quickly access common contract administration functions such as creating a new contract, or viewing saved searches.

- **Contracts Alerts** - This section provides an overview of contracts that have pending alerts. These are contracts coming due for renewal, about to expire, or recently expired. Click on the Contract Number link to open that contract. Click on the information icon to open the contract summary page.

CONTRACT SUMMARY

The **Contract Summary** screen provides a single location from which a user can view and access important contract information. The Summary screen "rolls up" information that is normally accessible from other areas in the contract. The fields that are viewable from the summary screen will depend on system configuration and your own visibility in to the contract.

View a Contract Summary

STEP-BY-STEP

To access the summary screen, perform one of the following actions:

- **Perform a contract search**. In the search results, click on the **contract number** in the Contract No. field.
- Open a contract from the contracts dashboard or search results and then click **Summary** in the left menu.

The screen displays with available sections and fields. Click on a section to view the available fields. If you have accessed the summary screen by clicking on the contract number in the search results, you can click the **Go To Contract** button to access the contract.

SEARCH CONTRACT ATTACHMENTS

Use the Search Contract Attachments page to search through contract text and attachments (including attachment versions) to find specific contract text or contract documents that you require.

STEP-BY-STEP

The goal of this task is to search for text in contracts or attachments. **Note:** The Classification filter defaults to Main Document, but can be adjusted. Main Documents are identified in the search results by the icon next to the file.

1. Navigate to **Catalogs and Contracts > Contracts > Search Contract Attachments**. The Search Contract Attachments screen opens.
2. Enter the **keywords** or **phrase** that you want to search for in the **Keywords** field.
3. Complete remaining search filter fields as needed.
4. Click **Search**. A new screen opens listing all records that match the search term.

5. **Note:** When Excel files that exceed 5,000,000 characters are added as attachments to a contract, only the first 5,000,000 characters are evaluated when searching for attachment information, but the entire attachment remains available within the contract for viewing and downloading.

6. Click on a **file name** to open the document. Click on a **contract number** to navigate to the associated contract.

SEARCH CONTRACT PARTIES

Use the Search Contract Parties page to search for companies that can be selected listed as first or second parties on a contract. You can perform a simple search or an advanced search.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contract Parties**.

2. Choose one of the following search options:

- **Simple Search** - Enter the **keywords** that you want to search for in the **Contract Party/Vendor** field.

- **Advanced Search** - Click **Advanced Search**. Enter values in the search filter fields.

3. Click the **Search** icon. A new screen opens listing all records that match the search criteria.

Note: A white star appears next to the primary owner profile, indicating that they are the default first party on contracts. You can designate a different primary owner profile at any time.

4. Click on a **contract party name** to open the record.

CONTRACT SETUP AND MANAGEMENT

Contract Basics

There are many options for creating and managing contracts in eMACS. Here is an overview of the basic steps you'll follow for most contracts:

- **Create the contract header** - Selecting **Create New Contract** opens an initial entry screen which is used for creating the contract record and entering basic information about the contract, such as when it starts, when it ends, and the eMACS users involved in managing the contract. This screen, and the information in it, is referred to as the contract header. Contract parties involved with the agreement is an example of additional data that can be added to the header after the initial entry screen fields are complete.

- **Add the contract document** - The contract document is an attachment that is designated as the Main Document (there is an ♛ icon next to it). The main document contains the contract text, but you can add multiple attachments to a contract that contain supplemental information.

- **Complete additional contract information** - Areas accessed from the left menu of a contract allow you to add information to the contract. This is where to attach a budget and items to a contract and track spend against it, manage contract review rounds, define who has access to the contract, and set up obligations and notifications. See the *Contract Pages* section below for a list of the information you can add in these screens.

- **Submit for review** - Once the contract draft is complete, it can be submitted for internal or external review before it is submitted for approval.

- **Submit for approval** - This action releases the contract into the approval workflow, where it will flow through the workflow steps. Once a contract completes the approval process, it moves to **Executed: In Effect** status on its start date.

- **Change approved contracts** - Once the contract is approved and in effect, you can use the Check Out for Internal Edit action to make changes that don't affect the terms and conditions of the contract, or create an amendment if changes do affect the terms and conditions of a contract.

Contract Pages

Once you've saved the contract header's initial entry screen, a **contract wizard** will take you through additional contract areas. Some elements are required, others are optional. These pages can be accessed from the left menu of the contract at any time.

Here is a brief overview of what each area does. What you see will vary, depending on the system's configuration, your user permissions, and the status of the contract:

- **Summary** - Click to view the contract's information on one page.

- **Header** - Contains basic information about the contract, such as when it starts, when it ends, and the parties involved with the agreement. Custom contract fields are in this screen.

- **Product Items** - This page provides options for managing contract items on contracts created from a sourcing event, allowing users to add, edit and delete contract items and shopping items.

- **Service Items** - This page provides options for managing contract items on contracts created from a sourcing event, allowing users to add, edit and delete contract items and shopping items.

- **Commodity Codes** - Provides the option to tie contracts to commodity codes, so that agencies can categorize, track and report on contracts using the codes.

- **Alternative Language** - This page is displayed only when the contract main document is using alternative language clauses. It provides a summary of the clauses used on the document, and also provides an option to change settings and fallback positions on alternative language clauses.

- **Attachments** - Attachments include a "soft copy" of the contract and other supplemental information. The document that contains the contract text is an attachment designated as the **Main Document** and is indicated by an icon next to it. This screen can also be used to manage obligation attachments.

- **Obligations** - Obligations are tasks or actions that need to be completed for a contract, such as documentation that must be attached to the contract, a review that must be completed each year, or compliance criteria that a contract must fulfill. You can add obligations from the Obligation Library or create one specific to the contract you are creating (an ad hoc obligation).

- **Review Rounds** - Used to send the draft contract for internal or external review before the contract is submitted for approval.

- **Submit for Approval/Approvals** - Used to submit the contract for approval and view the approval workflow.

- **eProcurement Setup** - eProcurement information is all information related to shopping against a contract. This includes information such as budgeting, spend, applicability, related goods and services, and PO clauses.

- **Budget and Spend** - Allows you to configure the contract budget and how it will be enforced. It is also a key page for reviewing all contract spend information.

- **Applies To** - Defines the departments, products etc. that can be applied to the contract.

- **Goods and Services** - In addition to catalog items, agencies are able to associate other types of items to the contract.

- **PO Clauses** - Contains a set of standard clauses that represent special conditions the vendor should reference regarding the order. When PO clauses are included with contracts, they will display on the purchase order each time a PO is generated from the contract.

- **Comments** - Allows users to start a discussion thread regarding the contract for internal users.

- **Users and Contacts** - Defines who has access to the contract. If you are creating a confidential contract, this is where to add the individuals who can access the contract.

- **Notifications** - Determines which notifications are sent to contract managers, stakeholders, and external contacts.

- **Contract Family** - Displays a list of all contracts connected to a contract, grouped by parent/child relationships, and amendments/renewals. You can also add a contract to a family in this screen.

CREATING CONTRACTS

Contracts can be entered into eMACS in the following ways:

- Creating a new "from scratch" contract
- Copying an existing contract
- Importing contract information from an external system.

In TCM, selecting **Create New Contract** opens a contract wizard which asks for basic information about the contract you are creating, such as its name and contract type. Once the initial entry screens are complete and you click Create Contract, the contract record is created and opens to the main contract page where additional information can be added, such as the contract parties involved with the agreement and how many times it can be renewed. This screen, and the information in it, is referred to as the **contract header**.

Along the left side of the contract header is a list of additional screens that are used to manage other elements of the contract. This is where to add things like attachments, commodity codes and shopping items, define who has access to the contract, or set up notifications. At any time, you can click Save Progress to save your changes and complete the remaining information at a later date.

The **contract document** (i.e., the text of the contract) is an attachment that is designated as the **Main Document**. For agencies using the authoring feature, you can click the Open Main Document button in the top left corner of the contract header or the Main Document link on the Attachments screen to open the document in Microsoft Word and modify text. If a contract has multiple attachments, you can select which attachments to print with the contract and in what order. Older versions of a document can be accessed from the Attachment Version History screen.

Once the contract draft is complete, it can be sent for internal or external review, then submitted for approval.

Once the contract is in Approved status, changes to a contract are made by creating a **contract amendment** if the changes will affect terms and conditions of a contract, or using the **Check Out for Internal Edit** option to update items that don't affect the terms and conditions of the contract.

Create a Contract

To create a new contract, you need the **Contract Manager** permissions, and you must be assigned as a Manager or Administrator to the same project as the contract you are creating.

Click **Save Progress** at any time to save your changes and return to the contract at a later date.

STEP-BY-STEP

Complete the contract wizard and create the contract record

1. Navigate to **Catalogs and Contracts > Contracts > Create New Contract...**. A Create Contract window opens. **Note:** Users with appropriate permissions can also create new contracts from the Contract Dashboard.

2. Enter a descriptive **contract name** in the Contract Name field. The name can be up to 100 characters long.

3. Select a **contract type** from the Contract Type drop-down. **Note:** The contract type cannot be changed once the contract is created.

   - Click on the Search icon
   - Select Non-Revenue Generating Contracts or Revenue Generating Contracts
   - Choose appropriate contract type
   - Click Save Changes

4. Select a **Project** to attach the contract to. If Access and Visibility is set to Normal in step 5, this will determine who has access to the contract by default.

5. Set access to the contract by selecting an **Access and Visibility** radio button as follows. You can modify these settings once the contract is created in the Users and Contacts screen:

   - Select **Normal** to inherit user access settings from the selected project.
   - Select **Confidential** to limit access to only the users that you manually add to the contract. **Note:** If you choose this option, inherited contract managers, stakeholders, external contacts and visibility settings will be removed from the contract and you will need to select the individuals who can access the contract in the Users and Contacts screen.

6. Click **Next**.

7. If available, choose the **template** you want to use as the basis of the contract OR select **Upload My Own Contract** to upload a separate contract document. You can only select one template or upload one document. You will only see

active templates associated with the contract type selected. **Historical contracts: choose Upload My Own Contract.**

8. Click **Next**.

9. Contract number is generated automatically. The Contract Number can be edited on this screen or in the Header section by clicking on the Pencil icon next to the Contract Number. Once the contract is saved, the contract number becomes read-only and can only be changed if you have the appropriate permissions:

    - **Note:** If the contract number wheel references the contract project, and the project is changed, the contract number will need to be updated manually.

Note: The only information required in this step is Time Zone; it auto-defaults to MDT/MST. Contract start and end dates can be blank when you create a contract and entered later in the Header section, but once values are entered the dates cannot be set to blank again.

10. (optional) Enter a **contract start date** as follows:

    - *The contract starts on a specified date* - Enter a **date** and **time** in the Start Date field. The time defaults to midnight if you do not set a specific time.

11. (optional) Enter a **contract end date** by selecting one of the following options:

    - *The contract ends on a specified date* - Select the **Expires On** radio button (selected by default) and enter a **date** and **time** in the End Date field. The time defaults to midnight if you do not set a specific time.
    - *The contract does not end* - Select the **No Expiration** radio button.

12. Click **Create Contract**. A contract is created, set into Draft status, and checked out to you. The contract header screen opens, where you can complete additional information for the contract (see sections below). Click Next to move to the next section, or Save Progress to save changes.

Complete contract header information

1. The **contract number** is populated from the contract wizard. If you have the appropriate permission, you may change the contract number if needed.

2. The **contract name** is populated from the contract wizard. Change the name if needed.

3. The contract **project** is populated from the contract wizard. Change the project if needed.

4. Enter details regarding the contract in the **Summary** field. Text entered in this field is displayed in the Contract Summary page.

5. Select **Yes** or **No** beside **Use eSignature for this contract?** to indicate whether or not the contract will be signed using eSignature. If you select Yes, an eSignature option appears in the left menu where the individuals who will sign the contract using eSignature settings are selected. **Historical contracts: select No.**

6. Under **Contract Parties** add first and second parties to the contract as follows. A primary first party is already added to the contract by default and must be changed. When eProcurement is enabled for a contract, the primary second party cannot be changed once the contract header is saved. If you have the appropriate permissions, you can add contacts and addresses to a contract party:

> **Note:** To view details of a record, click on the info icon next to a contract party in the search results to open the contract party's summary page. Users with the appropriate permission will also see a link that allows them to open and edit the vendor or contract party profile.

First Party

- Click **Add Party**, then **First Party**.
- Search for and select the **contract party** then click **Select Contract Party**. First parties must have an Owner contract party type.
- Choose a **contact** and click **Next**.
- Choose an **address** and click **Done**.
- Repeat to add additional first parties.

Second Party

- Click **Add Party**, then **Second Party**.
- Search for and select the **contract party** then click **Select Contract Party**. Second parties will typically have a Vendor, Customer, Individual or Partner contract party type.
- Choose a **contact** and click **Next**. You may leave the contact blank.
- Choose an **address**. You may leave the address blank.
- Click **Done**.
- Repeat to add additional second parties.

> **Note:** The first record added as first or second party is made the primary party by default. To make a new selection, open the Actions field next to the party that you want to set as primary, and select Make Primary. A primary party cannot be removed from a contract until another party is set as primary.
>
> **Note:** As long as a contract is in Draft status or fully executed status, users with the appropriate permission can change contract party address and contact information by selecting **Actions > Edit Address** or **Contact > Edit Contact**. An address or contact can be removed by selecting the blank link at the top of the list. Users without the permission can switch addresses and contacts, but cannot edit the information.
>
> Users who have permission to edit contract party profiles can access them by clicking on the name of a record selected as first or second party, then clicking the **Go to Profile** hyperlink in the pop up window.

7. In the **Dates and Renewal** section, complete the contract term, renewal, and review information as follows:

- **Time Zone, Start Date and End Date** - Contract time zone and dates are populated with any information entered in the contract wizard. Enter or modify contract start and end dates as needed while the contract is in a Draft status.
- (optional) Complete **Review** settings as follows. **Note:** These Review fields are used to schedule review notifications for approved contracts. They are used as reminders for long-term contracts or contracts with no expiration date. Review notifications settings are configured in the Notifications area.
- **Review Date** - Enter date of the first review that occurs after the contract is approved. When the review date is reached, the field value resets to the next scheduled review date, as defined by the review term and the number of reviews remaining.
- **Review Term** - Enter a review term. This is the interval between review dates, for example 1 day or 1 year.
- **Reviews Remaining** - Enter the maximum number of times that contract should be reviewed once it is approved. This value decrements each time a review notification is sent. Once it becomes 0, you will no longer receive contract review notifications. If the field is left blank, review notifications get sent as scheduled by the review term and review date until the contract ends.

- **Renewals Remaining** - Enter the number of times the contract can be renewed. This value decrements each time the contract is renewed. Once it becomes 0, the contract can no longer be renewed. If a number is entered in this field, you will also need to select Yes or No in the Auto-Renew field to indicate whether renewal contracts will be created manually by a contract manager (via the Contract Actions menu), or automatically by the system.

- **Automatically Apply Price File with Renewal** - **Leave set to No.** Select the **Yes** radio button if there is a price file associated with the contract and you would like to apply it automatically when the contract is renewed, otherwise select **No**.

- **Renewal Term** - If a number is entered in the Renewals Remaining field, select a **number** and **time period** that reflects the length of time that renewal contracts will be in effect. The term you enter allows the system to calculate the end date for renewal contracts. For example, if you choose to set a renewal term of one year, the contract end date of next renewal will be set to a year from its start date.

- **Auto-Renew** - **Leave set to No.** If a number is entered in the Renewals Remaining field, select **Yes** if you want the system to automatically create a renewal contract when the preceding contract reaches its end date and there are renewals remaining. If **Yes** is selected, you can enter a date in the Auto-Renew Creation field to define when renewal contracts will be created. If no number is entered in the Auto-Renew Creation field, renewal contracts become effective as soon as the end date of the previous contract is reached. **Note:** A contract flagged for auto-renewal will generate a Renewal Pending notification.

- **Auto-Renew Creation** - This field is displayed if the Auto-Renew field is set to Yes. Enter a **number** and **time period** that reflects the number of days prior to a contract's end date that the next renewal is to be created. For example, if the original contract's end date is set to January 31st, and you enter 10 days in this field, the first renewal contract will be created on January 21st. This will ensure a renewal contract is created and can be approved before the original contract expires. If this field is left blank, renewal contracts become effective as soon as the end date of the previous contract is reached.

> **Note:** Once a contract is renewed, the Renewal Status field on the contract header will indicate the status of the contract renewal. Clicking the information icon next to the renewal status will open the contract summary page of the contract renewal and provide a link to the renewal contract.

8. Click Save Progress or Next.

9. Click on Custom Contract Information. Complete all applicable/required custom contract information.
   - Project Manager
   - Existing Contract (Required) **Historical contracts: choose Yes**
   - Original Contract Fiscal Year (Required)
   - IT Contract (Required) If Yes, enter ITPR number
   - Contract Usage Type
   - Cooperative Purchasing Contract
   - Montana Vendor (Required)
   - Category Codes (Required)
   - Prevailing Wage (Required)
   - Does Retainage Apply?
   - Does Gross Receipt Tax apply?
   - Liquidated Damages Applicable?
   - Contract Security Required?

10. Click Save Progress or Next.

11. Click on Insurance. This section is optional. Insurances can be tracked in the Obligations section which can send out notifications. This section offers no ability for notifications to be sent out. To use this section, click Yes and complete the required information. Click Save Progress or Next.

12. Click on Contract Closeout. This section is used when contract has expired or is canceled. Click on the info icon next to the words “Contract Close-out” to access the web link to the contract closeout form. Complete this form as instructed and upload the form to Attachments section.

13. Add or update commodity codes. Commodity Codes are added, updated or deleted on the Commodity Codes page of the contract header. For contracts created from a sourcing event, commodity codes are imported from the sourcing event. One commodity code is designated as the reporting code and this is the code that is referenced when reporting on commodity codes. All other codes are designated as additional commodity codes.

14. Click **Commodity Codes**.

15. Click **Add Codes**, then search for and select the commodity codes you want to add to the contract.

> **Note:** For contracts created from a sourcing event, commodity codes from the event are automatically copied into the Commodity Codes page of the contract and identified by green check in the **From Sourcing Event** column.

16. Assign one commodity code as the reporting code by selecting **Set as Reporting Code** from the menu to the right of the commodity code. It will move to the top of the list and "Reporting Commodity Code" is displayed underneath the code. All other codes are designated as additional commodity codes.

> **Note:** The reporting code can be changed by selecting **Unassign as Reporting Code** next to the reporting code, or **Replace as Reporting Code** next to an additional commodity code.

17. (optional) Remove commodity codes by click **Remove** next to the code you want to delete.

Add or update contract documents (Attachments)

1. Click **Attachments**. **Historical contracts: add any additional contract document attachments here. DO NOT ATTACH ORIGINAL CONTRACT AT THIS TIME ONLY ADDITIONAL DOCUMENTS.**

2. Add or remove files and configure print settings as needed. If you have selected a template as the contract document, you will see it listed in this screen and designated as the main document (there is an icon next it). If you have selected Upload My Own Contract, click Upload Fully Executed Contract and upload the contract document file. **Note:** The Fully Executed Contract document is the attachment that contains the contract text. This document is always printed with the contract and is first in the print order. For additional attachments, you can choose whether or not attachments are printed with the contact, and the sequence in which they should print in the Print Order field.

3. Click on Obligations tab. Go to the section titled “Complete an Obligation.”

(optional) Add obligations

Obligations can be added from the Obligations Library, or you can create an obligation specific to this contract.

1. Click **Obligations**.

2. Click **Add Obligation** and choose one of the following options:

- Click **Add New Obligation** to add an obligation unique to the contract.
- Click **Add Obligation from Library** to add an obligation from the library.

3. If you are adding an obligation from the library, search for and select an **obligation** using the type ahead feature or click the search icon twice to display a list of obligations available, then click **Next**.

4. Add or modify the **Properties** of the obligation as follows:

- **Name** - Enter a name that clearly identifies the obligation. This is the name you'll see throughout the application and will also appear in the Subject line on emails sent regarding the notification.

- **Description** - Enter a description of the obligation under 256 characters.

- (optional) **Tags** - Select the tags that apply to the obligation by using the type ahead feature or click the blank field and then **Search** to display a list of tags you can select. Click **Save Changes**. These labels can be used when searching for obligations. Tags appear in the order chosen.

- (optional) **Options** - If the obligation involves providing documentation of any type, select the **Documentation Is Required** checkbox. If the checkbox is selected the obligation owner will need to upload a file to the obligation before it can be completed. If this checkbox is left blank, attachments can still be added to the obligation, but the obligation can be completed whether or not there is an attachment.

- **Frequency** - Select **One Time** or **Recurring** and enter due dates as follows. **Note:** The frequency type cannot be changed once the obligation is saved:

- If you chose **One Time**, enter the **due date** of the obligation in the calendar field.

- If you chose **Recurring**, set the schedule of occurrences. You can find detailed instructions for setting up a schedule in Contract Obligations.

- If the **Time Zone** of the obligation is different from the one used by the contract, clear the **Same as Contract** checkbox and select the appropriate time zone. The time zone of the obligation is the same as the contract by default.

- Click **Next**.

5. Under the **Owners and Stakeholders** heading, add or modify owners and stakeholders as follows:

- Click **Add New** to add an owner or stakeholder or **Actions > Properties** to change existing settings.

- Complete or modify the following fields:

- **Role** - Select **first party owner** to add the person responsible for marking the obligation as complete. Select **first party stakeholder** or **second party stakeholder** to add individuals who will only receive notifications regarding the obligation. Second party stakeholders must be listed as a second party contact on the contract header.

- **Person** or **Second Party Contact** (the field name changes according to the selection in the Role field) - Select the individual who will fulfill the role selected above using the search options provided.

- **Task/Notes** - Enter notes or a description of the task for the owner or stakeholder. For second party stakeholders, text entered here will appear in their email notifications.

- **Send Notifications** - Select the checkbox next to each type of notification you want sent to the individual selected above. Second party stakeholders do not receive Completed notifications.

- Click **Save** or **Save and Add Another** to save the record and immediately create another.

- Repeat for each owner or stakeholder you want added to the obligation. The Contract Manager option can only be chosen once as a first party owner or first party stakeholder, but any number of internal users can be added as first party owners or stakeholders.

6. In the **Advance Notice Settings** section, add or modify when advance notifications are sent as follows. A maximum of three advance notifications can be sent from 1-90 days prior to the obligation due date:

- Enter the **number of days** prior to the obligation due date that advance notifications will be sent to owners and stakeholders in the **Advance Notice #1**, **#2** and **#3** fields. You do not need to complete all three fields.

- Click **Save Changes**.

The obligation is added to the contract. For recurring obligations, each occurrence within a series is displayed when the **Show Recurring Obligations As** filter is set to **Occurrences**. Each occurrence is identified by a recurring obligation icon. If the recurring obligation is based on the contract start date, the occurrences will only be shown once the contract has a start date.

(optional) Configure shopping information

Agencies can set up their contracts to be used for shopping. The screens used to configure shopping options are displayed in the eProcurement Setup section in the left menu.

> **Note:** You can only activate a contract for shopping once it is in *Executed: Future* or *Executed: In Effect* status. If you need to activate a contract for shopping, open the contract once it reaches the appropriate status and select **eProcurement Setup** in the left menu. Click **Yes** next to **Active for Shopping** checkbox. Click **Save Changes**.

1. Click **eProcurement Setup** and complete the following fields: **Skip this section. ONLY complete the instructions in the blue box above ONCE contract is in Executed: In Effect status.**

- **Automatically Apply Purchases from this Vendor to this Contract** - Click **Yes** if you want the contract to be automatically associated with a line item in a cart if certain criteria are met. This option is HIGHLY recommended if there will only be one contract for the vendor AND all purchases are from this contract.
- **Blanket PO Number** - If you would like to use a blanket (standing) purchase order number each time the contract is used, enter the number here.
- **Pricing** - If the contract is configured for catalog pricing, select one of the following options:
- **Needs Price Set** - Select Yes to indicate that the contract is associated with a hosted catalog.
- **Associated Price Set** - Click **Select Price Set** to indicate that the contract is associated with a vendor price file, then select a price set.
- **Display Options in Browse Contracts** - This only displays if non-catalog entry is enabled. This setting determines if contract items will be listed when users who display associated forms and non-catalog requests search for contracts. Click **Yes** to display the contract in searches. Click **No** to hide the contract from searches, click **Inherit From Contract Type** to use the settings from the contract type.
- Click **Save Changes**.

2. Click **Budget and Spend** and complete the following fields: **Complete ONLY the first two bullets below.**

- **Budget** - Enter the expected total spend amount for the current renewal period if applicable. This will be used as the benchmark to compare actual spend figures against.
- **Enforce Budget** - **Leave set to No.** Click Yes if the budget should be evaluated when a user place orders for items associated with the contract.
- In the **Limits Per Requisition** section, set limits for requisitions applied against the contract. These settings drive validation messages that appear when assigning the contract to PR's, PO's and invoices:
- **Contract Spend** - Enter the minimum and maximum dollar amounts allowed per purchase requisition.
- **Line Item Quantity** - Enter the minimum and maximum quantities allowed per line item on a purchase requisition.
- In the **Limits Per Voucher** section, select the **Same as Requisitions** checkbox if you want to use the settings entered for requisitions above to also be used for invoices assigned to the contract. If the checkbox is left blank, enter **minimum** and **maximum limits** for invoices assigned to the contract.
- Click **Save Changes**.

> **Note:** The Actual Spend and Contract Reports sections on this page are active once the contract is in *Executed: In Effect* status.

3. The **Applies To** section is used to define which departments, business units or user roles can use a contract. You can apply restrictions by departments, roles, business units, users, product/SKU numbers, UNSPSC numbers and fulfillment centers by entering information in the appropriate tab. **Note:** If you wish to allow all users to have access to the contract, no action is necessary. **For the Applies To section, ONLY select the appropriate agency under available Business Units. Click the right arrow to move that agency name to the Business Units with access to this Contract column. Click Save Changes.**

4. **Skip this section.** The **Goods and Services** section is used to associate items such as forms, instructions for ordering items outside of the application, and non-catalog items to a contract.

- **Forms** - The form that is inherited from the contract type is displayed by default. Click Yes next to Show Contract Forms in Product Search Results to allow users to search for the form and locate it via product search. Click Add Form to add a pre-configured form to the contract (the form must already exist in your system).
- **Ordering Instructions** - Click **Yes** next to Display in Product Search Results if you want the instructions to be displayed in the search results. Enter any information over and above the ordering instructions in the Additional Information field. Select how you want the ordering instructions to be displayed in the Ordering Instructions drop down: select **Use Attachments** to upload a file containing the instructions, or **Use Rich Text** to enter instructions on the page. You can choose to include the vendor icon, or upload an image in the Images field.
- **Non-Catalog Items** - Click **Add Contract Non-Catalog Item** and complete the fields.

5. **Skip this section.** Click **PO Clauses** and select the checkbox in the Assigned column for each clause you would like to add to the contract, then click **Save Changes**. PO Clauses are used to place text on faxed and emailed purchase orders that represent special conditions that the vendor should reference regarding the order.

(optional) Add a comments thread (for internal users)

1. Click **Comments**.

2. Click **Start New Thread.**

3. Enter a **subject** and **message**.

4. Click **Save**. The message is listed on the Comments page.

Define access to the contract or set confidential access (Users and Contacts)

1. Click **Users and Contacts**.

2. (optional) Define access to the contract as follows:

- If you have chosen **Confidential** on the contract header, the inherited contract managers, stakeholders, external contacts, and visibility settings will be removed from the contract, and you need to add the internal users who can access the contract in step 3 below.
- If you have chosen **Normal** on the contract header, settings are inherited from the project. You can modify the Internal Users, Visibility Controls and External Contacts as outlined below, if needed.

> **Note:** While the contract is in Draft status, you can switch the access settings by clicking the **Make Confidential** button to change contract access from normal to confidential, or the **Make Not Confidential** button to change contract access from confidential to normal.

3. **Internal Users** - These are internal users who have access to the contract. You can add users individually, by role, by department or by business unit (for stakeholders only), but individuals on a role or department list will not automatically receive notifications regarding the contract. You control the type of access they have to the contract by adding them to one of the following categories:

- **Contract Managers** - These users have full control over the contract. The person who created the contract is always a contract manager by default.
- **Contract Administrators** - These are internal users who have been named as contract administrators on the contract project. Naming a user as a contract administrator on the project will grant that user contract manager access to all contracts created within that project. If a contract is using normal settings, you cannot add or remove contract administrators inherited from the project. If a contract is using confidential settings, contract administrators are removed from the contract and cannot be added.
- **Stakeholders** - Internal users who can view the contract summary only and receive notifications.

4. **Visibility Controls** - Define what users who are not contract managers assigned to the contract can see on the Contract Summary Page. Options are *Full*, *Partial* or *Limited*. Click **Preview** to check what users will see.

5. **External Contacts** - Click **Add Contacts** to select individuals outside of your agency who may have an interest in the contract and who you want to receive email notifications. Individuals added as external contacts cannot opt out of receiving email notifications, but you can remove them from the list.

> **Note:** External contacts are shared between all contracts – if you create a new external contact, that contact will be available for assignment to other contracts.

6. Click **Save Changes**.

Select the notifications that are sent regarding the contract

1. Click **Notifications**.
2. Under the **Notifications** section, click the appropriate checkboxes to send start date, end date and renewal notifications to contract managers, contract stakeholders and/or external contacts.
3. (optional) Under **Advanced Notice Settings**, enter the **number of days** prior to the contract start date, end date or renewal date that reminders are sent to the roles selected in the corresponding "Advance Notices" rows above.
4. (Sourcing Director Contracts only) Under **Sourcing Event Advance Notice**, enter the **number of days** prior to the contract end date a notification is sent to sourcing event managers that a contract created from a sourcing event is up for renewal or about to expire.
5. Under **Spend Tier Notification Settings**, select the appropriate checkbox to send notifications based on **PR spend**, **PO spend** and/or **Invoice spend**. Click the **Add Notification Tier** button to add a notification tier.

(optional) View related contracts or add contract to a contract family

1. Click **Contract Family**. The Contract Family screen opens showing related contracts.
2. (optional) To add a contract to a family, click **Link a Child to this Contract**.

(optional) Send for review Historical contracts: Review rounds are not needed when entering a historical contract.

1. Click **Review Rounds**.
2. Select **Start Drafting Next Round**, then select either **Internal Review Round** to send the contract to other users in the system, or **External Review Round** to indicate that individuals outside of eMACS are reviewing the contract. The fields that are completed will depend on whether it is an internal or external review round:

Internal Review Round

- Click **Add Reviewer**.
- In the User Search window, select the **users** you want to send the contract to for internal review and click **Save Changes**.
- Click **Begin Round**. A confirmation window shows who has been selected for review.
- Click **Begin Internal Review**. A status of "Sent" or "Started" appears next to the internal reviewer. Internal reviewers will see "Contracts to Review" under their Actions Items menu, as well as receive a system generated notification. Click the information icon next to the status to see details about the review.

External Review Round

- Click **Add Reviewer**.
- In the Add Reviewer window, enter **contact information** for external reviewer, and click **Save**.

- Click **Begin Round**. An External Review email window opens where you complete the information that you want to send to the external reviewer as follows:

- **Email Recipients** - Select the checkbox next to each reviewer that you want to send the email to. All external reviewers are listed and selected by default.

- **Attachments** - Select or clear checkboxes so that only the attachments that you want to send with the email are selected. All contract documents are listed (including the main document). Attachments that have been flagged to print with the contract in the Attachments screen are selected by default.
- **Include Full Contract PDF** - Select the checkbox if you also want to include the Full Contract PDF file in the email.

- **Email Content** - Standard text and placeholders appear in the fields by default. Modify text and placeholders as needed.

- Click **Send Email.** A status of "Sent or "Not Sent" appears next to the external review. Click the information icon next to the status to see details about the review.

- Once the external reviewer has replied to your email, make changes to the contract on their behalf, and move their reviewer's status to Done for that review round. Steps are as follows:

- Once the external reviewer has replied to your email, make changes to the contract on their behalf.

- In the **Review Rounds** screen, open the external review round and click **Actions > Done with Review**.

- Enter notes about the review and click **Done with Review**.

As each reviewer completes their review, **Done** appears as their reviewer status on the Review Rounds page. Once all reviewers have responded, the review round will close. To add a new round, check out the contract again, add new reviewers, and begin a new round. When all review rounds are complete, the contract is ready to be submitted for approval.

Add signers for eSignature Historical contracts: Signatures are not needed in historical contracts only new ones.

The eSignature page is displayed when **Use eSignature for this contract?** on the contract header is set to **Yes**.

1. Click **eSignature**.

2. Click **Add Signer** and complete fields as follows:

- **Contract Party** - Select the **contract party** of the signer. The contract parties available for selection are the ones selected on the contract header. Only contacts from the selected contract party will be available for selection in the "Choose a Contact" field in the next step. Leave this field **blank** to add a signer manually.

- **Choose a Contact** - Choose a **signer** from the drop down list OR select **Manually Enter Signer** to add a signer who is not on the contact list. The contacts on the list are from the contract party selected above.

- If you have selected Manually Enter Signer, enter the **Name**, **Email** and **Title** of the signer.

- If you are using a sequential signing order and are adding more than one signer to a contract, select the **sequence** in which you want the person to sign the contract in the **Signing Order** field. This field only appears when more than one signer is added to a contract.

- Click **Save Changes**.

3. Repeat to add additional signers to the contract.

Last step! Submit for approval

1. Once the contract is complete and correct, click **Submit for Approval** in the left menu.

2. Click the **Submit for Approval** button in the Submit for Approval screen. The contract is sent for approval.

3. Once the contract reaches the **ESignature Setup** or **Out for Signature** workflow step, it will stop. The contract manager must open the contract and manually send the contract out for electronic signature by clicking **Contract Actions > Launch eSignature**. This will send the document out to the e-signers for approval.

Note: If "Yes" has been selected for the "Use eSignature for this contract?" question on the contract header, but the "Launch eSignature" contract action has **not** been selected, a signed copy of the contract must be manually uploaded into the system and the workflow steps must be expedited before the contract will move to the next step in the workflow.

Historical contracts:

1. **Click on Contract Actions and choose Upload Fully Executed Contract.**
2. **Select file.**
3. **Choose Fully Executed Date**
4. **Click on Save Changes.**

Once the contract is approved, it moves to a status of *Executed: In Effect*. Changes to the contract are made by performing an internal edit or creating an amendment.

Note: You can only activate a contract for shopping once it is *Executed: Future* or *Executed: In Effect* status. If you need to activate a contract for shopping, open the contract once it reaches the appropriate status and select **eProcurement Setup** in the left menu. Click **Yes** next to **Active for Shopping** checkbox. Click **Save Changes**.

Attachments

The Attachments area manages files that are linked to a contract. Attachments include a "soft copy" of the contract and other supplemental information. Attachments can be files, or you can associate URL links with the contract by adding them as attachments.

The contract document (the document that contains contract text) is an attachment that is designated as the **Main Document** and displayed in the attachments screen with an ♛ icon next to it. The file designated as the **Main Document** is always printed with the contract and defaults as the first attachment in the print order.

There are two actions used to manage contract attachments:

- **Unassign as Main Document** is available on Main Documents only and will remove the Main Document attribute from the selected attachments.
- **Replace as Main Document** is available for attachments other than the Main Document when a Main Document already exists for a contract. Selecting this action will replace the selected attachment as the Main Document as well as remove the Main Document attribute from the original Main Document.

ACCEPTABLE FILE FORMATS

The following file formats are allowed to print with the contract: .tif, .tiff, .gif, .jpeg, .jpg, .png, .bmp, .pdf, .xls, .xlsx, .ppt, .pptx, .doc, .docx, .rtf, .txt, .txt. Images should be scaled down to fit into the .pdf page.

Note: When Excel files that exceed 5,000,000 characters are added as attachments to a contract, the entire attachment is available within the contract for viewing and downloading, as usual. When searching through attachment information, only the first 5,000,000 characters are evaluated in the search.

ADDITIONAL ATTACHMENTS

For contracts with multiple attachments, you can select which attachments to print with the contract and in what order.

OBLIGATION ATTACHMENTS

To view all obligation attachments on a contract, click the **Obligations** tab on the Attachments page. Obligation attachments listed here are not included in the total number of attachments displayed next to **Attachments** in the left menu, and they are not printed with the contract. You can also open an obligation attachment from the obligation it has been attached to, but this tab provides a quick way to find obligation attachments without requiring you to open each occurrence.

ATTACHMENT SIZE

For contracts that are using eSignature, a warning message will appear if the total size of all the attachments sent for signature exceed 25 MB. It does not prevent the contract from being sent for signature, but it may stop the process from executing correctly.

ATTACHMENT VISIBILITY ON CONTRACT SUMMARY

The Contract Summary Visibility drop down field allows contract managers and contract administrators to hide a contract attachment from the Contract Summary page. This field appears when adding an attachment or editing attachment properties. It provides two options:

- **Use Summary Configuration Settings (default)** - Access to the attachment on the Contract Summary screen is based on Full, Partial and Limited view settings in the Summary Configuration screen, the Users and Contacts visibility controls set on the contract record, and user permissions.
- **Admin/Manager Only** - If this option is selected, the Summary Configuration and contract visibility controls are bypassed and only the contract manager or contract administrator can view and access the attachment from the Contract Summary screen.

Changes to the default setting are logged in the Attachments history.

ATTACHMENT VERSIONS

Users can choose to upload a new version of a document.

Clicking **Upload New Version** on the Attachments page allows users to upload a new version of an existing attachment with an optional comment. The file name of each version can differ, but the display name of the file is the same across all versions of the file.

The history of uploaded files, and older versions of the files can be viewed by selecting **Version History** next to the file in the Attachments screen.

CONTRACT ATTACHMENT ACTIONS

An **Actions** menu displays in the far-right column of each attachment in the attachments list. From this menu, you can:

- *Edit Properties* - Change the name, print order or print with contract settings.
- *Unassign as Main Document* - Remove the Main Document designation from an attachment.
- *Replace/Set as Main Document* - Set an attachment as the main document.
- *Upload New Version* - Upload a new version of an attachments.
- *Go to link* - Open the url link.
- *Download* - download the file.

Upload Main Document

The goal of this task is to upload the main document for the contract. The main document can be uploaded from the Attachments page or from the **Upload Main Document** button on the left menu.

STEP-BY-STEP

1. Open the appropriate contract for editing.

2. In the left menu, click **Attachments**.

3. Click **Upload Main Document**. Note: if a Main Document has already been flagged, the **Upload Main Document** button will display as in the left navigation menu and will not display on the Attachments page. See **Managing Attachments** below for information about replacing the Main Document.
4. In the **Attachment Type** field, select **File** to add a document to the contract, or **Link** to list a url as an attachment to the contract.

5. Depending on the attachment type chosen, upload the file or url as follows:

- **File**: If you have selected the File attachment type, click **Select files...** to locate and add the file from your system, or drag and drop a file into the gray square surrounding the Select files.... field.

> **Note:** When Excel files that exceed 5,000,000 characters are added as attachments to a contract, the entire attachment is available within the contract for viewing and downloading, as usual. When searching through attachment information, only the first 5,000,000 characters are evaluated in the search.

- **Link**: If you have selected the Link attachment type, enter a meaningful name for the page in the **Page Name** field and the **URL** link in the URL field. Click to the right of the field to test the URL. **Note:** Page Name is not required. If you don't enter a value in that field, the name will default to the URL link text.

6. In the **Print Order** field, select where you want the attachment to display in the sequence of the attachments on the contract. You can choose to make the attachment First, Last, or set where to display it in relation to other saved attachments. The option initially defaults to Last. **Note:** If there are no other attachments or links associated with the contract, this field does not display.

7. In the **Print/Send with Contract** field, select **Yes** if you want the attachment to be printed with the contract, or **No** if you do not want the attachment to be printed with the contract.

8. (optional) In the **Contract Summary Visibility** field, select who can see the attachment on the Contract Summary page. Select **Use Summary Configuration Settings (default)**, to define access by the Full, Partial or Limited visibility controls on the contract (and as set on the Summary Configuration screen), or **Admin/Manager Only** to make the attachment only visible to the contract manager and contract administrator.

9. Click **Save Changes**. The attachment will be added and displayed on the **Attachments** page. The main document is identified by the in the Attachments display.

Change the Main Document

You can change which document is flagged as the Main Document. There are two options. You can first unassign the current main document and then set another attachment as the main document, or you can use the Replace as Main Document option to replace the current main document with another attachment.

REASSIGN THE MAIN DOCUMENT

- In the **Actions** menu next to the Main Document, select **Unassign as Main Document** then click **Yes**.

- In the Actions button next to the attachment that you want to flag as the Main Document, click the attachment's **Actions** menu and select **Set as Main Document**.

REPLACE THE MAIN DOCUMENT

- In the **Actions** menu next to the attachment that you want to be the Main Document, select **Replace as Main Document**, then click **Yes**.

Additional Contract Attachments

In addition to the Main Document, you can include other supplemental information as attachments. **Note:** When Excel files that exceed 5,000,000 characters are added as attachments to a contract, only the first 5,000,000 characters are evaluated when searching for attachment information, but the entire attachment remains available within the contract for viewing and downloading.

STEP-BY-STEP

The goal of this task is to upload additional attachments for the contract.

1. Open the appropriate contract for editing. Check out the contract if it is not checked out to you.

2. In the left menu, click **Attachments**.

3. Click 

4. In the **Attachment Type** field, select **File** to add a document to the contract, or **Link** to list a url as an attachment to the contract.

5. Depending on the attachment type chosen, upload the file or url as follows:

- **File**: Click **Select files...** to locate and add the file from your system, or drag and drop a file into the gray square surrounding the Select files.... field.

> **Note:** When Excel files that exceed 5,000,000 characters are added as attachments to a contract, the entire attachment is available within the contract for viewing and downloading, as usual. When searching through attachment information, only the first 5,000,000 characters are evaluated in the search

- **Link**: Enter a meaningful name for the page in the **Page Name** field and the **URL** link in the URL field. Click  to the right of the field to test the URL. **Note:** Page Name is not required. If you don't enter a value in that field, the name will default to the URL link text.

6. In the **Print Order** field, select where you want the attachment to display in the sequence of the attachments on the contract. You can choose to make the attachment First, Last, or set where to display it in relation to other saved attachments. The option initially defaults to Last. **Note:** If there are no other attachments or links associated with the contract, this field does not display.

7. In the **Print/Send with Contract** field, select **Yes** if you want the attachment to be printed with the contract, or **No** if you do not want the attachment to be printed with the contract.

8. (optional) In the **Contract Summary Visibility** field, select who can see the attachment on the Contract Summary page. Select **Use Summary Configuration Settings (default)**, to define access by the Full, Partial or Limited visibility controls on the contract (and as set on the Summary Configuration screen), or **Admin/Manager Only** to make the attachment only visible to the contract manager and contract administrator.

9. Click **Save Changes**. The attachment will be added and displayed on the **Attachments** page.

Contract Comments

Use the Comments page to add internal notes regarding the contract for internal users.

Start a Contract Comment Thread

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).
2. Search for and open the contract you want to add a discussion thread to.
3. In the left menu, select **Comments**. The Comment page opens.
4. Click **Start New Thread**.
5. Enter a **subject** and **message**.
6. Click **Save**. The message is listed on the Comments page.

Reply to a Contract Comment Thread

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).
2. Search for and open the appropriate contract.
3. In the left menu, select **Comment**. The Comment page opens.
4. Under the comment you want to reply to, select **Reply To This Thread**.
5. Enter a **message** and click **Save**.

Contract Commodity Codes

You can categorize, track and report on contracts using commodity codes that have been set up in your system. For contracts created from a sourcing event, commodity codes are imported from the sourcing event.

The use of commodity codes can also be enabled or disabled for each contract type. When commodity codes are enabled for a contract type, a Commodity Codes section is displayed on the contract header for all contracts created from the contract type.

This is where contract managers add, delete or update commodity codes on a contract.

TYPES

There are two types of commodity codes that can be added to a contract:

- **Reporting Commodity Code** - One commodity code can be assigned as the reporting code and this is the code that is referenced when reporting on the contract. A contract can have only one reporting code, but the code designated as the reporting code can be changed.
- **Additional Commodity Code** - All other codes on a contract are additional commodity codes. A contract can have any number of additional commodity codes.

COMMODITY CODES FROM SOURCING EVENTS

If a sourcing event has commodity codes (reporting, additional or both) and a contract is created from the sourcing event, the commodity codes are automatically copied into the Commodity Codes page of the contract and identified by a green check in the **From Sourcing Event** column. This allows contract managers to track contracts with commodity codes from sourcing events.

Commodity codes from sourcing events can be assigned and unassigned as reporting codes. If they are deleted from a contract, either manually or through imports, the sourcing designation does not reappear if the code is later added back in manually.

ADVANCED SEARCH

Advanced Search has a Commodity Code filter that can be used to find contracts containing a specific commodity code. By default, the search only looks at reporting codes on contracts. Select the **Include Additional Commodity Codes** checkbox to include contracts where the selected codes are either reporting or additional commodity codes.

COMMODITY CODES AND CSV OR XML IMPORT/EXPORT

Commodity codes on a contract can be updated through CSV or XML import/export. The **Reporting Commodity Codes** and **Additional Commodity Codes** fields are included in templates or export files only when commodity codes are enabled for the agency. If using CSV import/export, we recommend exporting a search that contains only the contracts you want to change.

Add Commodity Codes to a Contract

You need **contract manager** permissions to perform this task.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).
2. Search for and open the **contract** you want to update. Check out the contract if it is not checked out to you.
3. In the left menu, click **Commodity Codes**.
4. Click **Add Codes**.

> **Note:** For contracts created from a sourcing event, commodity codes from the event are automatically copied into the Commodity Codes page of the contract and identified by green check in the **From Sourcing Event** column.

5. Search for and select the **commodity code(s)** you want to add to the contract. Use the type ahead or click the search icon to see a list of commodity codes.
6. If needed, assign one commodity code as the reporting code by selecting **Set as Reporting Code** from the menu to the right of the commodity code. Reporting codes are not required. The selected code will move to the top of the list and "Reporting Commodity Code" is displayed underneath the code. All other codes are designated as additional commodity codes.

> **Note:** The reporting code can be changed by selecting **Unassign as Reporting Code** next to the reporting code, or **Replace as Reporting Code** next to an additional commodity code.

7. Click **Save Changes**.

Change the Reporting Commodity Code on a Contract

A contract can have only one reporting code, but the code designated as the reporting code can be changed.

You need **contract manager** permissions to perform this task.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the **contract** you want to update. Check out the contract if it is not checked out to you.

3. In the left menu, click **Commodity Codes**.

4. Expand the **Remove** menu next to the commodity code that you want that you want to designate as the reporting code and select **Replace as Reporting Code**. The commodity code will move to the top of the page, and "Reporting Commodity Code" is displayed underneath the code. The previous reporting code moves down the list and designated as an additional reporting code.

Remove a Commodity Code from a Contract

Commodity codes must be enabled for your agency and for the contract type used by the contract. You need **contract manager** or **contract administrator** permissions to perform this task.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the **contract** you want to update. Check out the contract if it is not checked out to you.

3. In the left menu, click **Commodity Codes**.

4. To the right of the commodity code that you want to delete, click **Remove**.

5. Click **Yes** in the confirmation window.

Search for Contract Commodity Codes with Advanced Search

Advanced Search has a Commodity Code filter that can be used to find contracts containing a specific commodity code. By default, the search only looks at reporting codes on contracts. Select the **Include Additional Commodity Codes** checkbox to include contracts where the selected codes are either reporting or additional commodity codes.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Click **Advanced Search** if you are not on the Advanced Search page.
3. In the Commodity Code field, search for and select the **commodity codes** you want to search for. By default, the system will search for reporting codes only.

4. (optional) Click the **Include Additional Commodity Codes** checkbox if you want the system to search both reporting and additional commodity codes on contracts.

5. Complete remaining search filters as desired.

6. Click **Search**.

Contract Family

The Contract Family screen displays a list of all contracts connected to a contract. Related contracts are grouped into two sections:

- **Parent/Child Contracts** lists all contracts that are either a parent or child of the selected contract, as well as their parent and child contracts.
- **Contract Versions** lists all amendments and renewals of the contract selected in the Parent/Child Contracts section above. Click the info icon to open the Contract Summary, and from there you can open the contract by clicking Go to Contract.

The Contract Family screen also allows you to create a child contract or link a child contract to your contract.

When establishing a parent/child relationship, either via linking a child contract or selecting a parent contract, you indicate the parent/child date relationship. The date relationship can be one of the following:

- The child contract dates must be within the parent's contract dates
- The child contract dates may be outside the parent's contract dates
- The child contract start date must be within the parent's contract dates.

View a Contract Family

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the contract with the contract family you want to view.

3. In the left menu, select **Contract Family**.

The Contract Family screen opens, showing a list of contracts connected to the open contract.

Add a Contract to a Contract Family

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the appropriate **contract**.

3. In the left menu, select **Contract Family**.

4. Expand the **Link a Child to this Contract** button, and choose one of the following options:

- Select **Link a Child to this Contract** to make another contract the child of this contract (the open contract becomes a parent in the hierarchy).
- Select **Create Child Contract** to create a new contract that is a child of this contract.

5. Choose one of the following:

- If you selected *Create a Child Contract*, the contract wizard opens, allowing you to create a new contract.
- If you selected *Link a Child to this Contract*, choose whether start and end dates of the child contract must be within those of the parent, in the **Child Contract start dates and end dates** area, then select the **contract** you want to link and **Save Changes**.

The linked contract appears under Parent/Child Contracts in the Contract Family screen.

Contract Parties

The participants in a contract are referred to as contract parties. Contract parties are chosen as either a first or second party on a contract. Their contract party **type** determines whether or not the business can be selected as a first or second party on a contract:

- The **First Party** is the owner of the contract. In most cases, this is your agency. Only contract parties with a contract party type of Owner can be selected as first party on a contract. If designated as primary, the business will appear as the first party by default when creating a contract.
- The **Second Party** is the individual or vendor that the first party is entering into the agreement with. Second parties can have a contract party type of Owner, Vendor, Customer, Individual, or Partner.

CONTRACT PARTY TYPES

Contract party profile information is supplied from two areas in the system, and their **contract party type** determines where the information is stored:

- Companies that have been entered solely for use as first parties on a contract are stored in the Catalogs and Contracts area and can only have an **Owner** contract party type. Updates to these types of records do not affect the vendor database.
- Companies from the vendor database are also available for selection as contract parties. Records live in the vendor database if they have a **Vendor**, **Customer**, **Individual**, or **Partner** contract party type. They cannot be an Owner contract party type. Updates to these types of records do affect the vendor database. If you create a contract party profile with one or more of these contract party types, it will be stored in the vendor database along with existing vendors.

Both types of records can be accessed from the Search Contract Parties screen.

UPDATING CONTRACT PARTY INFORMATION

Users with the **Edit Party Contact on Contract** permission can edit contact information if the contract is in Draft status or fully executed. Users with the **Edit Party Address on Contract** permission can edit address information if the contract is in Draft status or fully executed. Users without the permissions are only able to choose an option from the drop down field.

ADDRESSES AND CONTACTS

An owner profile can have multiple addresses and multiple contacts.

- Addresses can belong to one or more of the following address types: Fulfillment, Remittance, Physical. **Physical** is selected by default.
- Contacts can belong to one or more of the following contact types: Corporate, Fulfillment, Remittance, Technical, Other. **Corporate** is selected by default.

You can flag one address of each address type and one contact for each contract type as primary to indicate that they are the first option to choose when creating a contract.

PRIMARY PARTIES

In eMACS, only one owner profile can be designated as primary. This makes it the company that is selected by default as the first party when a contract is created. This applies to all contracts in the system.

When searching for contract parties, a white star ☆ appears next to the primary owner profile, indicating that they are the default first party on contracts. A different primary first party can be selected at any time.

ADDING CONTRACT PARTIES TO A CONTRACT

First and second parties on a contract are listed in a table format, and users with the appropriate permission have options for adding and deleting contract parties and contract party contacts and addresses. The table displays the first parties at the top, and the second parties at the bottom, with the primary party listed first, followed by any additional parties in alphabetical order. Additional parties are optional on a contract.

When eProcurement is enabled for a contract, the primary second party cannot be changed once the contract header is saved.

eSignature

The eSignature feature provides the ability to sign contracts electronically.

For agencies using this feature, contracts are flagged to use eSignature by selecting **Yes** next to **Use eSignature for this contract?** on a contract header. Once this option is selected, the eSignature option is displayed in the left menu.

The **eSignature** page is where contract managers add the individuals who are to sign the contract electronically, and set configuration options such as the sequence in which they sign. This page also shows status and tracking for each signer once the contract has been sent for approval.

eSignature contracts are submitted for approval and move through the regular approval workflow until they reach the **Out for Signature** or **ESignature Setup** workflow step. At this point the workflow stops and the contract manager must manually select **Launch eSignature** from the Contract Actions menu to continue. Signature block placement settings affect what happens next:

If the contract is using **manual** signature block placement, the contract stops at the **ESignature Setup** step. After the contract manager selects Launch eSignature, he or she must also add signature block placeholders to the contract in Adobe Sign before the contract is sent to the signers for approval.

> **Note:** If a contract is set to use eSignature on a contract, and the Launch eSignature step is **not** selected, the contract will not move to the next step in the workflow until a signed contract document is manually uploaded into the system and the contract manager expedites the workflow step.

Signers will receive an email notification that allows them to open the document and sign it electronically. The status of the document is "Pending Signature". Contract managers can view the status for each signer on the eSignature page.

When all signers have signed the document, the contract returns to the regular workflow.

An audit trail provides a record of electronic signatures from your eSignature provider. An "Agreements eSignature errors" notification will indicate when the timeline for a contract waiting for an eSignature has expired. Clicking on the "Contract eSignature errors" link opens the eSignature Integration Status page, where you can filter contracts to show contracts with errors.

ORDER OF APPROVALS

A **Signing Order** field appears when more than one signer is added to a contract which allows you to select the sequence in which individuals sign the contract.

ATTACHMENT SIZE

For contracts that are using eSignature, a warning message will appear if the total size of attachments printed with the contract and sent for signature exceed 25 MB. It does not prevent the contract from being sent for signature, but it may stop the process from executing correctly. The warning message will also be displayed if the total size is less than 25 MB when the contract enters workflow, but the compiled document then exceeds the limit. The warning will not display if the contract is in an Executed status, a signed contract has been uploaded, or once the contract has been sent to the eSignature service.

CONTRACT STATUS

The status of contracts that have been sent for eSignature is displayed in the eSignature page next to the signer. Click on the icon next to the status to view more information on the contract.

The contract action **Return to Draft** is available on all manual and eSignature workflow steps for contract managers and contract administrators. If a signer declines to sign a contract, an error will occur on the Out for Signature step. If you choose to return the contract to Draft status, and want to send it out for eSignature a second time, you will need to resubmit the contract for approval.

EXPIRATION TIME FOR ESIGNATURES

If a contract has been sent for eSignature, and the time span allowed for a contract waiting for an eSignature has expired, the action item "Contract eSignature Errors" displays the contract's status and the number of errors.

Clicking the action item will take you to the eSignature Integration Status page where you apply filters to show contracts with errors. The time of expiration is determined by DocuSign.

TROUBLESHOOTING

Warnings and errors are displayed on the top of the eSignature page. You can click on an error or warning in the results to see details about missing or inactive contract parties. A "Fix It" link is available for users who have permission to edit contract party information, allowing them to correct a blank or duplicate email.

Add Signers to a Contract with DocuSign

When adding the individuals you want to electronically sign the contract the options you have are determined by your system settings:

- Your system may be set so that only **contract party contacts** can be selected as signers. If this is the case the contact you choose as a signer must be active and have a valid email address before the contract can be submitted into workflow. For first party contacts, only those who have "Can-eSign Contracts" set to Yes on their contact information can be selected as signers.
- If your system allows signers to be entered **manually**, there are two options: you can select the signer from contract party contacts, or you can enter signer information manually.

Once a signer is added to the contract, you can edit, delete and reorder the signers. No changes can be made once the contract has entered workflow unless the contract is not approved or retracted from the eSignature application.

STEP-BY-STEP

The **Use eSignature for this contract?** setting on the contract header must be set to **Yes**. Signers must have a valid email address.

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts**.

2. Select the **contract** you want to add signers to. Check out the contract if it is not checked out to you.

3. On the contract header, make sure the **Use eSignature for this contract?** setting is set to **Yes** so that the eSignature page is displayed in the left menu.

4. In the left menu, select **eSignature**.

5. Click **Add Signer**.

6. Complete fields in the **Add Signer** window as follows:

- **Contract Party** - Select the **contract party** of the signer. The contract parties available for selection are the ones selected on the contract header. Only contacts from the selected contract party will be available for selection in the "Choose a Contact" field in the next step. Leave this field **blank** to add a signer manually.

> **Note:** If you do not select a contract party in this step, you must manually enter the signer's information in the next step.

- **Choose a Contact** - Choose a **signer** from the drop down list OR select **Manually Enter Signer** to add a signer who is not on the contact list. The contacts on the list are from the contract party selected above.

- If you have selected Manually Enter Signer, enter the **Name**, **Email** and **Title** of the signer.

- If you are using a sequential signing order and are adding more than one signatory to a contract, select the **sequence** in which you want the person to sign the contract in the **Signing Order** field. This field only appears when more than one signer is added to a contract.

- Click **Save Changes**.

- (optional) Repeat to add additional signers to the contract.

7. Continue with creating the contract.

8. Once the contract is complete, select **Submit for Approval** in the left menu and then click the **Submit for Approval** button. The contract moves through the regular approval workflow until it reaches the **Out for Signature** step.

> **Note:** Once the contract is in the approval workflow, you cannot add more signers or update the contract unless the contract is not approved or retracted from the eSignature application.

9. Once the contract reaches the **ESignature Setup** step in the workflow, the contract manager must **return to the contract and manually send the contract to the e-signers** by expanding the **Contract Actions** menu in the top right corner of the screen and selecting **Launch eSignature**.

The individuals selected as signers in the eSignature screen will receive an email asking them to approve the contract via electronic signature. The contract status is **Pending Signature**. Once the document is sent and the e-signatories have signed the contract, it can take approximately 15 minutes for the data to be updated in the system. The status is updated and contract moves to the next workflow step, or to **Executed: In Effect** status.

> **Note:** If a contract is set to use eSignature in the contract header, it stops when it reaches the **ESignature Setup** step in the workflow and will display an "Out for Signature" status. If the Launch eSignature step is **not** selected at this point, the contract will not move to the next step in the workflow until a signed contract document is manually uploaded into the system and the contract manager expedites the workflow step.

Contract Notifications

You can "alert" or notify contract managers, stakeholders, or external contacts of important events related to a contract, such as start and end dates, or when budget tiers are reached. Advance notifications can be set up for start, end and renewal dates, so that contract managers or administrators can take action prior to the event occurring, for example, advance notification of an expiring contract could give a contract manager time to prepare a replacement.

For contracts created from a Sourcing Director event only, the Sourcing Event Advanced Notice option on the Notification page can be set to inform sourcing event managers that a contract created from a sourcing event is up for renewal or about to expire. The notification provides an option to re-create the sourcing event by copying the original sourcing event to a new sourcing event. See Create a Sourcing Event from Renewing or Expiring Contracts.

CONFIGURING WHO RECEIVES CONTRACT NOTIFICATIONS

All users who may receive contract notifications are defined on the Users and Contacts page of a contract. From there, you can limit who receives notifications by contract manager, stakeholder or external contact for specific contract events on the Notifications page.

All of the following elements must be in place before an **internal user** will receive notifications regarding a contract:

- They must have the appropriate contract notification preferences enabled on their user profile.
- They have access to the contract as defined on the Users and Contacts page of a contract.
- The appropriate notification settings have been set up on the contract, either in the Notifications page or the Contract Review field on the contract header.

When a contract is configured to send emails to **external contacts**, the emails are automatically sent to the email addresses specified. External contacts cannot opt out, but you can remove them from the notification page if they no longer need to receive the emails. You cannot enable or disable notifications for external contacts. See Create an External Contact for a Contract.

Configuring Notifications on a Contract

Use the Notifications page to determine who receives notification of contract events, such as start and end dates or when budget tiers are reached. Advance notifications can be set up for start, end and renewal dates so that contract managers can take action prior to the event occurring, for example, advance notification of an expiring contract could give a contract manager time to prepare a replacement.

All the users who may receive contract notifications are defined on the Users and Contacts page of a contract. From there, you can limit who receives notifications by contract manager, stakeholder or external contact for specific contract events on the Notifications page.

In addition to the settings above, **internal users** must have contract notification preferences enabled in their user profile before they will receive notifications regarding a contract. When a contract is configured to send emails to **external contacts**, the emails are automatically sent to the email addresses specified. You cannot enable or disable notifications for external contacts, but you can remove them from the notification page if they no longer need to receive the emails.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the contract you want to update.

3. In the left menu click **Notifications**.

4. Under **Notifications**, select the appropriate checkbox to send a notification to the Contract Managers, Contract Stakeholders and External Contacts that are set up on the **Users and Contacts** page of the contract. Notification options include:

- **Budget Exceeded** - Sent when the overall budget of the contract has been exceeded.
- **Percentage Tiers** - Sent when percentage tiers on the contract are exceeded, as set in the **Spend Tier Notification Settings** section of the page below.
- **Amount Tiers** - Sent when amount tiers on the contract are exceeded, as set in the **Spend Tier Notification Settings** section of the page below.
- **Start Date - Advance Notice** - Sends an advance notice of the contract start date, as set in the **Advance Notice Settings** section of the page below.
- **Start Date Passed** - Sent when the contract start date occurs.
- **End Date - Advance Notices** - Sends an advance notice of the contract end date, as set in the **Advance Notice Settings** section of the page below.
- **End Date Passed** - Sent when the contract end date occurs.
- **Renewal Date - Advance Notices** - Sends an advance notice of the contract renewal date, as set in the **Advance Notice Settings** section of the page below.
- **Renewal Date Passed** - Sent when a contract renewal date occurs.
- **Review Date Passed** - Sent when a contract review date occurs.

5. (optional) Under **Advance Notice Settings**, enter the **number of days** prior to the contract start date, end date or renewal date that reminders are sent to the roles selected in the corresponding "Advance Notices" rows above. For example, if you have selected Contract Managers to receive End Date - Advance Notices in step 4, and enter 30, 15, and 1 in the End Date field here, the system will send advance notifications to contract managers 30 days prior to the end date, 15 days prior to the end date, and 1 day prior to the end date. **Note**: If you leave a value blank, a notification will not be sent.

6. *(For Sourcing Director contracts)* Under **Solicitation Advance Notice**, enter the **number of days** prior to the contract end date a notification is sent to sourcing event managers that a contract created from a sourcing event is up for renewal or about to expire. The notification provides an option to re-create the sourcing event by copying the original sourcing event to a new sourcing event.

7. (optional) Under **Spend Tier Notification Settings**, select the appropriate checkbox next to **Send Spend Tier Notification For** to send notifications based on **PR spend**, **PO spend** and/or **Invoice spend**. These are based on amounts in the Budget and Spend page of the contract. To add a notification tier, click the **Add Notification Tier** button. Choose **Amount** or **Percentage** and configure the tier.

8. Click **Save Changes**.

Set Internal User Contract Notification Preferences

Contract notification preferences determine which contract notifications an internal user may receive and the format they receive them in. They can choose to receive notifications by email, through system notifications, or both. **Note:** In addition to enabling contract notification preferences, an internal user must have access to the contract and the appropriate notifications must be set up on the contract before they will receive notifications.

STEP-BY-STEP

1. Navigate to the user profile and select **Permissions Settings > Notification Preferences > Contracts**.

2. For each item below leave the setting as **Default**, or click the **Edit Section** link in the top right corner, click the **Override** radio button, and choose your notification preference from the drop down menu.

CONTRACTS

- **Contract Budget /Tier Notification** - Sent when the overall contract total budget is exceeded or a tier notification is met. **Note:** The setting for when an email is triggered is configured on the **Budget and Spend** page of a contract. Emails can be triggered based on PR, PO, and/or invoice spend.

- **Contract Start Date - Advance Notice** - Sent when a contract start date is approaching (lead-time of event).

- **Contract Start Date Passed** - Sent when a contract start date occurs.

- **Contract End Date - Advance Notices** - Sent when a contract end date is approaching (lead-time of event).

- **Contract End Date Passed** - Sent when a contract end date occurs.

- **Contract Renewal Date - Advance Notices** - Sent when a contract renewal date is approaching (lead- time of event).

- **Contract Renewal Date Passed** – Sent when a contract renewal date occurs.

- **Contract Review Date Passed** - Sent when a contract review date occurs. **Note:** This notification is separate from the notifications sent regarding internal or external review rounds set up on the Review Rounds page of a contract.

- **Contract Internal Review Notification** - Sent when the user has a contract to review for an internal review round. **Note:** This notification is separate from review notifications sent regarding review dates entered on the contract header.

- **Contract Manager Internal Review Notification** - Sent to contract managers when an internal review round is complete on a contract they are managing. **Note:** This notification is separate from review notifications sent regarding review dates entered on the contract header.

- **Contract Facilitation Notification** - Sent to an internal user when they are assigned as contract facilitator.

- **New Contract Request Discussion Thread** - Sent when a discussion thread has been added to a contract.

- **New Contract Request Discussion Reply** - Sent when a discussion thread reply has been added to a contract.

- **External Reviewer Email Failure** - Sent when an email sent to an external reviewer for an external review round has failed.

- **Contract Originated From SalesForce** - Sent to the contract managers named on *Salesforce* contracts when a new contract is created.

- **Contract Renewal Auto-Created** - Sent to the contract managers when a contract renewal is automatically created based on auto-renew settings on the contract.

- **Zero Auto-Renewals Remain** - Sent to contract managers when a contract is set to auto-renew and there are 0 renewals remaining.

CONTRACT - APPROVAL WORKFLOW

- **Contract Returned Notice** - Sent when a contract approver has returned a contract.
- **Contract Pending Workflow Approval** - Sent to contract approvers when there is a new contract requiring their approval in their contract workflow folder.
- **Contract Approval Workflow Error** - Sent to contract administrators when there is an error in their contract workflow folder.
- **Contract Sent to eSignature Application** - Sent when a contract is sent for eSignature.
- **Contract Declined Signature** - Sent when a signer on a contract has declined to sign the contract.

CONTRACT OBLIGATIONS

- **Contract Obligation Advance Notification** - Sent to the first party owner or stakeholder when an obligation due date is approaching. The timing and frequency of advance notifications is configured in the Advanced Notice Setting section on the obligation. A maximum of three advance notifications can be sent 1-90 days prior to the obligation due date.
- **Contract Obligation Due Date Notification** - Sent to the first party owner or stakeholder on the due date of the obligation.
- **Contract Obligation Past Due Notification** - Sent to the first party owner or stakeholder after an obligation due date if it has not been marked as complete. Past due notifications are sent based on global settings under **General Workflow - Pending Approval Document Reminder** (Site Configuration > Workflow Setup > General Workflow Settings). If these settings are configured, they control how many days after the due date that the notification is sent, the interval between past due notifications, and how old the obligations should be before they no longer generate past due notifications. If these setting are not configured, past due notifications are sent 5-10 minutes after the due date, and every day at midnight after that by default.
- **Contract Obligation Complete Notification** - Sent to the first party owner or stakeholder when an obligation has been marked as complete. Second party stakeholders do not receive Completed notifications.

3. Click **Save Changes**.

Contract Obligations

Obligations are tasks or actions that need to be completed for a contract, such as documentation that must be provided, reviews that must be completed, or compliance criteria that a contract must fulfill.

You can create, manage, track, and report on contract obligations throughout the lifecycle of a contract to stay in compliance with terms and conditions. Contract stakeholders can be included in notifications, providing complete visibility to your obligations and total transparency of upcoming contract milestones and deadlines.

The sections below describe how obligations work on contracts.

ADDING OBLIGATIONS TO A CONTRACT

Obligations can occur before, during or after a contract's start and end dates. There are two ways to add obligations to a contract:

- Add an obligation to a contract from the Obligation Library, which contains a set of frequently used or standard obligations that you can copy into a contract and modify the settings as needed.
- Add obligations that are specific to the **contract**. These are unique obligations that only apply to the contract they are added to. They are sometimes referred to as ad hoc obligations.

Obligations added to a contract are not included on amendments, renewals, or copied contracts. The contract manager needs to complete or cancel obligations on the original contract and re-create them on the new contract, or manage obligations from the original contract, as set by your agency's business processes.

Obligations remain active on the original contract if they are not cancelled.

OBLIGATION STATUSES

Obligations on a contract show the following color-coded statuses:

- **Overdue** - The obligation due date has passed.
- **Upcoming** - The obligation is due within 30 days of the current date.
- **Future** - The obligation due date is more than 30 days from the current date.
- **Complete** - The obligation has been marked as complete.
- **Cancelled** - The obligation or obligation series has been cancelled and cannot be edited or marked as complete. Related notifications will not be sent.
- **Ongoing** - This status appears for recurring obligation series only and indicates that the series has occurrences in various statuses, for example, if there are occurrences in an Upcoming, Future and Overdue status. If all occurrences in a series have the same status, the series will show that status.

EDITING OBLIGATIONS

Contract managers have full control of obligations on their contracts – they can view, edit and mark them as complete.

In general, obligations on contracts can be changed as long as the contract is in an editable status and is checked out for editing. Otherwise, the ability to edit an obligation will depend on the obligation settings, what information you want to change, and the status of the obligation or contract. For example, if an obligation series is based on the contract start date and that date has occurred, you cannot change the start date of the obligation series, but you can change the description or owners and stakeholders. Obligations that have been completed or cancelled cannot be changed.

Changes to obligations in the Obligation Library do not affect contracts that already have the obligation added to them.

Obligations **cannot** be added, edited or cancelled when a contract is in any of the following statuses: *Terminated*, *Complete*, *Pending Approval*, *Out for Signature*, *Pending Signature*.

COMPLETING OBLIGATIONS

The obligation owner is responsible for ensuring that the task or action required by the obligation is done and marking the obligation as complete. Obligation owners can mark obligations as complete from the Obligations Across Contracts report. If their permissions provide them with access to the contract, they also have the option to mark them as complete on the contract. Contract managers have full control of obligations on their contracts and can mark them as complete if the owner is unable to do so.

If you are completing an obligation on a contract, you will only be able to mark an occurrence complete when the **Show Recurring Obligations As** filter on the Obligations page is set to **Occurrences**. For recurring obligations:

- You cannot mark an occurrence as complete unless its predecessor is marked as complete. You can cancel an unfulfilled occurrence in order to mark a later one as complete.

- Recurring obligations based on the contract start date can only be completed if the contract start date cannot be edited, as follows:

- Recurring obligations based on the contract start date **cannot** be completed when the contract is in one of the following statuses: *Draft*, *Pending Approval*, *Internal Review*, *External Review*, *Out for Signature*, *Pending Signature*.

- Recurring obligations based on the contract start date **can** be completed when the contract is in one of the following statuses: *Complete*, *Executed: Future*, *Executed: In Effect*, *Terminated*, *Expired* or *Superseded*.

CANCELLING OBLIGATIONS

Contract obligations can be cancelled. Cancelled obligations cannot be edited or completed, and related notifications will not be sent. They show a status of **Cancelled** and are listed on the bottom of the Obligations page by default.

The options for cancelling obligations are slightly different for one time or recurring obligations:

One Time

- **Cancel Obligation** appears for one time obligations only. It cancels the obligation and its related notifications.

Recurring

- **Cancel Occurrence** appears for recurring obligations only. It cancels a single occurrence of a series and its related notifications.

- **Cancel Series** appears for recurring obligations only and allows you to cancel an entire series of occurrences. The system will ask you to enter a "Cancel as of" date, which cannot be earlier than the most recently completed occurrence in the series. You can set a future date for cancellation. All occurrences prior to "Cancel as of" date remain as is and can be edited as usual. All occurrences after the "Cancel as of" date are deleted along with their related notifications. Once a series is cancelled you cannot return to the series and add more occurrences.

OBLIGATION ATTACHMENTS

Files related to an obligation can be attached when completing an obligation. If the **Documentation Is Required** checkbox was selected when the obligation was created, a file must be attached to the obligation before it can be marked as complete.

Similar to contract attachments, you can download, delete, and upload new versions of obligation attachments, and view the version history in the Obligations tab on the Attachments page. Unlike contract attachments, the attachment count in the left menu does not reflect obligation attachments and they do not print with the contract. For this reason, you are also not limited to printable file types.

You can search for obligation attachments in the following areas:

- *On the obligation it has been attached to* - Search for the obligation in the Obligations page on the contract (it must be marked as complete), then click the information icon next to the obligation status and click **file name** to download and open the attachment.
- *On the contract Attachments page* - To view all obligation attachments on a contract, click **Attachments**, then click the **Obligations** tab. This tab provides a quick way to find obligation attachments without requiring you to open each obligation. You can also download and delete obligation attachments in this page, upload new versions and view the version history.
- *On the Search Contract Attachments page* - Navigate to **Catalogs and Contracts > Contracts > Search Contract Attachments**. Select **Obligation Attachments** in the **Classification** field, then click **Search**.

SEARCHING FOR OBLIGATIONS ON CONTRACTS

On **contracts**, the **Show Recurring Obligations As** filter on the Obligations page provides two options for viewing obligations:

- The **Series** view shows one time obligations and recurring obligation series, but it does not list each occurrence within a series. No search filtering is present and obligations cannot be marked as complete in this view. This view is useful for keeping track of recurring obligations based on the contract start date, as the obligation only exists as a series until the contract has a start date, at which point each occurrence in the series is created.
- The **Occurrences** view shows one time obligations and lists each occurrence within a recurring obligation series as a separate item. Search filters can be set by due date, obligation name, obligation status, first party owner, or tags. Click the **More Options** link near the search area to display additional filters. Obligations can be marked as complete in this view. Recurring occurrences based on the contract start date will only be displayed once the contract has a start date.

The **Obligations Across Contracts** report provides a list of all one time and recurring obligations connected to you. This includes obligations where you are an obligation owner or stakeholder, and also obligations on contracts that you have access to. Those with the appropriate permissions can complete obligations from the report. For obligation owners and first party stakeholders, links in their email notifications will take them to the Obligations Across Contracts report, where they will only see the obligation for which they were notified. See Obligations Across Contracts Report.

Add an Obligation to a Contract

The **Manage Contract Obligations** permission (Permission Settings > Contracts > Manage Contract Obligations) is needed to perform this task. If you are applying tags to an obligation for categorizing and filtering purposes, tags must exist.

STEP-BY-STEP

Create the obligation

1. Navigate to **Catalogs and Contracts > Contracts > Contract Search** (or click on the Contract Dashboard if you have the appropriate permissions).

2. Search for and open the **contract** you want to update. Check out the contract if it is not checked out to you.

3. Click **Obligations** in the left menu.

4. Click **Add Obligation** and choose one of the following options:

- Click **Add New Obligation** to add an obligation that is unique to the contract.

- Click **Add Obligation from Library** to add an obligation from the library.

5. If you are adding an obligation from the library, search for and select an **obligation** using the type ahead feature or click the search icon twice to display a list of obligations available, then click **Next**.

6. Add or modify the **Properties** of the obligation as follows:

- **Name** - Enter a name that clearly identifies the obligation. This is the name you'll see throughout the application and will also appear in the Subject line on emails sent regarding the notification.

- **Description** - Enter a description of the obligation under 256 characters.

- (optional) **Tags** - Select the tags that apply to the obligation by using the type ahead feature or click the blank field and then **Search** to display a list of tags you can select. Click **Save Changes**. These labels can be used when searching for obligations. Tags appear in the order chosen.

- (optional) **Options** - If the obligation involves providing documentation of any type, select the **Documentation Is Required** checkbox. If the checkbox is selected, the obligation owner will need to upload a file to the obligation before it can be completed. If this checkbox is left blank, attachments can still be added to the obligation, but the obligation can be completed whether or not there is an attachment.

- **Frequency** - Select **One Time** or **Recurring**. **Important!** The frequency type cannot be changed once the obligation is saved:

- Select **One Time** if the obligation will occur only once, then enter the **due date** of the obligation in the calendar field.

- Select **Recurring** if the obligation will occur multiple times. If selected, additional fields are displayed where you set the schedule of occurrences as follows:

- **Repeats Every** - Select a number and time period that reflects the interval between occurrences:

- **Days** - Select if you want to set the interval by days. The number entered will reflect the number of days between occurrences, e.g., every second day, or every tenth day.

- **Weeks** - Select the checkbox next to each day of the week you want the obligation to occur.

- **Months** - Select the day of the month that you want the obligation to occur. You can enter a specific date or select a day of the week:

- **Date** - Select **Day** in the first drop down field, then select a **number** for the date in the second drop down field. **Note:** If day 29, 30 or 31 is selected and any month within the contract lifecycle has fewer than 29, 30 or 31 days, the notification will be sent on the last day of that month. For example, if the setting is 'on Day 30' of every month, and February has only 28 days, the notification will go out on the 28th day of February.

- **Day of the week** - Select **First**, **Second**, **Third**, **Fourth** or **Last**, which refer to weeks in the month (Last is for months that are five weeks long), then select a **day of the week**. For example, if you choose Second and Friday, the obligation would land on the second Friday of the month.

- **Years** - Select the **month** that the obligations occur in from the first drop down field, e.g., in **January**), then select a **date** or **day of the week** for the occurrence as indicated for Months, above.

- **Start** - Select one of the following options:

- **On Contract Start Date** - The obligation schedule begins when the contract reaches *Executed: In Effect* status.

Note: Recurring obligations based on the contract start date can only be completed if the contract start date cannot be edited. For example, these types of obligations on contracts in *Draft* status **cannot** be completed because the contract start date can still be changed. The same obligations on contracts in *Executed: Future* status **can** be completed because the contract start date is set.

- **Custom Date** - The obligation schedule begins on a specific date. If this option is selected, enter the **start date** in the calendar field.

- **End** - Select one of the following options:

- **By Contract End Date** - The obligation schedule ends on the contract end date. Occurrences will be added or removed if the contract end date changes.

- **By Custom Date** - The obligation schedule ends on a specific date. If this option is selected, enter the **end date** in the calendar field.

- **After** - The obligation schedule will end after a specified number of occurrences. If this option is selected, enter the **number** of occurrences.

7. If the **Time Zone** of the obligation is different from the one used by the contract, clear the **Same as Contract** checkbox and select the appropriate time zone. The time zone of the obligation is the same as that on the contract by default.

8. Click **Next**.

(optional) Add or modify owners and stakeholders and set notifications

Define who is responsible for the obligation, and when they will receive notifications:

1. Under the **Owners and Stakeholders** section, click **Add New** to add an owner or stakeholder. If you want to change the existing settings on an obligation from the obligation library, select **Properties** from the **Actions** menu for the item you want to change.

2. Complete or modify the following fields:

- **Role** - Choose one of the following options:

- Select **First Party Owner** to add an owner to the obligation. Owners are responsible for marking the obligation as complete. Contract managers (the contract managers named on the contract) or internal users can be first party owners.

- Select **First Party Stakeholder** to add an internal user who will receive notifications regarding the obligation unless they are also a contract manager. Contract managers (the contract managers named on the contract) or internal users can be first party stakeholders.

- Select **Second Party Stakeholder** to add a second party contact who will receive email notifications regarding the obligation. The person must be listed as a second party contact on the contract header. You can only add a second party stakeholder if the obligation already has a first party owner.

> **Note:** Second party stakeholders receive notifications only. **If a second party stakeholder is responsible for an obligation task, the first party owner will need to mark obligations as complete on their behalf.** First party owner contact information is included in the email sent to second party stakeholders.

- **Person** or **Second Party Contact** (the field name changes according to what is selected above) - Select the individual who will fulfill the role selected above:

- Select **Contract Manager** if the contract manager(s) on the contract will be a first party owner or stakeholder. This is the default setting. The Contract Manager option can only be chosen once as a first party owner and once as a first party stakeholder. Being an owner or stakeholder does not limit a contract manager's access to the obligation, but you can choose which notifications they receive by making them a first party owner or stakeholder.

- Select **Pick a User** to add a specific individual as first party owner or stakeholder. A second field will open where you can choose who will fill the role:

- If you have selected **First Party Owner** or **First Party Stakeholder** in the Role field, you can select from a list of **internal users**.

- If you have selected **Second Party Stakeholder**, you can select from a list of contacts that belong to the **second party added to the contract**.

You cannot use the **To Be Named** option at the contract level.

- (optional) **Tasks/Notes** - Enter notes or a description of the task for the owner or stakeholder. For second party stakeholders, text entered here will appear in their email notifications.

- **Send Notifications** - Select the checkbox next to each type of notification you want sent to the individual selected above:

- **Advance Notice** - Notifications are sent when the obligation due date is approaching. A maximum of three notifications can be sent from 1-90 days prior to the obligation due date. The schedule for this must be configured in the Advanced Notice Settings section.

- **Due Date** - Notifications are sent on the due date of the obligation.

- **Past Due Notice** - Notifications are sent if the obligation due date has passed and the obligation has not been completed. The timing and frequency of past due notices is based on your system settings. By default they are sent 5-10 minutes after the due date has occurred and every day at midnight after that.

- **Completed** - A notification is sent 5-10 minutes after the obligation is marked as complete. Second party stakeholders do not receive Completed notifications.

3. Click **Save** to add the owner or stakeholder, or **Save and Add Another** to save the record and immediately add another.

4. Repeat for each owner or stakeholder you want added to the obligation. The Contract Manager option can only be chosen once as a first party owner or first party stakeholder, but any number of internal users can be added as first party owners or stakeholders.

(optional) Enter advance notification settings

Enter the number of days prior to the obligation due date that advance notifications are sent to owners and stakeholders. A maximum of three advance notifications can be sent from 1-90 days prior to the obligation due date. For example you can create advance notifications that will be sent 10, 5 and 1 day prior to the obligation due date.

These settings will apply to all individuals added to the obligation who have Advance Notice settings selected. For instance, you cannot have the first party owner receive three advance notifications, but the first party stakeholders only receive one.

Advance notifications will not be sent, even if configured for owners and stakeholders, if Advance Notice Settings are not also configured.

1. Under the **Advance Notice Settings** section, enter the **number of days** prior to the obligation due date that advance notifications will be sent to the owners and stakeholders named above in the **Advance Notice #1**, **#2** and **#3** fields. You do not need to complete all three fields.

2. Click **Save Changes**.

Save the obligation

1. Once the obligation is complete and correct, click **Save**.

The obligation is added to the contract. For recurring obligations, each occurrence within a series is displayed when the **Show Recurring Obligations As** filter is set to **Occurrences**. Each occurrence is identified by a recurring obligation icon . If the recurring obligation is based on the contract start date, the occurrences will only be shown once the contract has a start date.

Obligations can only be marked as complete when the **Show Recurring Obligations As** filter is set to **Occurrences.**

Edit an Obligation

Contract managers have full control of obligations on their contracts – they can view, edit and mark them as complete. Changing information on an obligation that has already been added to a contract depends on a number of factors:

- In general, obligations on contracts can be changed as long as the contract is in an editable status and checked out for editing. Obligations **can** be added, edited or cancelled when a contract is in any of the following statuses: *Draft*, *Internal Review*, *External Review*.

- Once the contract reaches *Executed: In Effect*, *Executed: Future*, *Expired*, or *Superseded* status, you can add or cancel obligations, but the ability to edit an obligation will depend on the obligation settings, what information you want to change, and the status of the obligation or contract. For example, if an obligation series is based on the contract start date and that date has occurred, you cannot change the start date of the series, but you can change the description or owners and stakeholders. Cancelled or completed obligations cannot be changed.

- Obligations **cannot** be added, edited or cancelled when a contract is any of the following statuses: *Terminated*, *Complete*, *Pending Approval*, *Out for Signature*, *Pending Signature*.

- Changes to obligations in the Obligation Library do not affect contracts that already have the obligation added to them.

- For recurring obligations:

- For recurring obligations with **custom** start and end dates, the start and end dates of a series can be changed until the first occurrence is completed. After that, the start and end dates on the series become read only fields and only the due date on individual occurrences can be changed.

- For recurring obligations based on **contract** start and end dates, obligation occurrences will change as follows:

- **Start Date** - The system automatically recalculates the series schedule if the contract start date is changed while the contract is still in *Draft* status. Once the contract reaches *Executed: In Effect* status, the start date for the occurrence schedule cannot be changed.

- **End Date** - Occurrences may be added or removed if the end date is changed while the contract is still in *Draft* status. Once the contract reaches *Executed: In Effect* status the end date of the series schedule cannot be changed unless the contract is extended. In this case occurrences will be added to the schedule. See Extend Contract End Date.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Contract Search** (or click on the Contract Dashboard if you have the appropriate permissions).

2. Search for and open the **contract** that has the obligation you want to change. Check out contract if it is not checked out to you.

3. Click **Obligations** in the left menu. You can change one time obligations and recurring obligation series in the **Series** view. If you are changing an occurrence in a recurring obligation series, select **Occurrences** in the **Show Recurring Obligations As** field.

4. Expand the **Properties** menu for the **obligation** you want to change, then select **Properties** or **Owners and Stakeholders**, depending on the information you want to change.

5. Change field values as needed. The fields that are open for editing will depend on the obligation settings, what information you want to change, and the status of the obligation or contract.

6. Click **Save Changes**.

The change is saved. If you are editing a recurring obligation series, all occurrences in the series will be changed.

Cancel an Obligation

Cancelled obligations cannot be edited or completed, and related notifications will not be sent. They show a status of **Cancelled** and are listed on the bottom of the Obligations page by default. The options for cancelling obligations are slightly different for one time or recurring obligations:

One Time

- **Cancel Obligation** appears for one time obligations only. It cancels the obligation and its related notifications.

Recurring

- **Cancel Occurrence** appears for recurring obligations only. It cancels a single occurrence in a series and its related notifications.
- **Cancel Series** appears for recurring obligations only and allows you to cancel an entire series of occurrences. You will need to enter a "Cancel as of" date, which cannot be earlier than the most recently completed occurrence in the series. You can set a future date for cancellation. All occurrences prior to "Cancel as of" date remain as is and can be edited as usual. All occurrences after the "Cancel as of" date are deleted along with their related notifications. Once a series is cancelled you cannot return to the series and add more occurrences.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Contract Search** (or click on the Contract Dashboard if you have the appropriate permissions).

2. Search for and open the **contract** that has the obligation you want to cancel. Check out the contract if it is not checked out to you.

3. Click **Obligations** in the left menu. If you are cancelling an occurrence in an obligation series, select **Occurrences** in the **Show Recurring Obligations As** field.

4. Expand the **Properties** menu for the **obligation** you want to cancel and select one of the following options. The options available depend on the type of occurrence:

One time obligations

- Select **Cancel Obligation** to cancel the obligation and its related notifications.

Recurring obligations

- Select **Cancel Occurrence** to cancel a single occurrence of a series and its related notifications.

- Select **Cancel Series** (or **Series > Cancel Series** in the Occurrences view) to cancel the entire series.

5. If you are cancelling a recurring obligation **series**, enter the date the cancellation takes effect in the **Cancel as of** field. This cannot be earlier than the most recently completed occurrence in the series, but it can be a future date.

6. Click **Cancel Occurrence**, **Cancel Obligation**, or **Cancel Series** in the confirmation window.

The obligation occurrence or series and their related notifications are cancelled. **Cancelled** appears in the Status column and the obligations are moved to the bottom of the Obligations page. If you have cancelled a recurring obligation series, all occurrences prior to "Cancel as of" date remain as is and can be edited as usual. All occurrences after the "Cancel as of" date are deleted along with their related notifications.

Complete an Obligation

The obligation owner is responsible for ensuring that the task or action required by the obligation is done and marking it as complete. Contract managers have full control of obligations on their contracts and can mark them as complete if the owner is unable to do so.

There are two places where an obligation can be completed:

- From the Obligations page on a **contract**.
- From the **Obligations Across Contracts** report.

Obligation owners who have access to the contract can mark obligations as complete on the contract or from the Obligations Across Contracts report. Obligation owners who do not have access to the contract must complete obligations from the Obligations Across Contracts report.

For recurring obligations:

- You cannot mark an occurrence as complete unless its predecessor is marked as complete. You can cancel an unfulfilled occurrence in order to mark a later one complete.

- Recurring obligations based on the contract start date can only be completed if the contract start date cannot be edited, as follows:

- Recurring obligations based on the contract start date **cannot** be completed when the contract is in one of the following statuses: *Draft*, *Pending Approval*, *Internal Review*, *External Review*, *Out for Signature*, *Pending Signature*.

- Recurring obligations based on the contract start date **can** be completed when contract is in one of the following statuses: *Complete*, *Executed: Future*, *Executed: In Effect*, *Terminated*, *Expired* or *Superseded*.

Complete an Obligation on a Contract

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Contract Search** (or click on the Contract Dashboard if you have the appropriate permissions).

2. Search for and open the **contract** that contains the obligation to complete. Check out the contract if it is not checked out to you.

3. Click **Obligations** in the left menu.

4. Select **Occurrences** in the **Show Recurring Obligations As** field.

5. Expand the **Properties** menu for the **obligation** you want to complete, then select **Mark as Complete.** The Mark as Complete window opens.

6. Complete the following fields:

- **Completed Date** - Enter the **date** and **time** the obligation was completed. The current date and time are displayed by default.

- (optional) **Notes** - Enter **notes** about completing the obligation.

- **Attachments** - Add any **attachments** required by the obligation. Click **Select files...** to locate and add the file from your system, or drag and drop a file into the gray square surrounding the Select files.... field.

> **Note:** Attachments are required if the **Documents Is Required** checkbox was selected when the obligation was created and you will not be able to complete the obligation until a file is uploaded here.

7. Click **Mark as Complete**.

The obligation status moves to Complete and a notification will be sent to the appropriate owners and stakeholders. The Complete Date column on the Obligations page shows the completed date.

Complete an Obligation from the Obligations Across Contracts Report

Use this option if you are an obligation owner and do not have access to the contract.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Reports > Obligations Across Contracts**.

2. Set the search filters and click **Run Report**. The report searches for overdue and upcoming obligations by default. See Obligations Across Contracts Report for details.

3. Expand the **Mark as Complete** menu for the obligation you want to complete, then select **Mark as Complete**. The Mark as Complete window opens.
4. Complete the following fields:

- **Completed Date** - Enter the **date** and **time** the obligation was completed. The current date and time are displayed by default.

- (optional) **Notes** - Enter **notes** about completing the obligation.

- **Attachments** - Add any **attachments** required by the obligation. Click **Select files...** to locate and add the file from your system, or drag and drop a file into the gray square surrounding the **Select files....** field.

Note: Attachments are required if the **Documents Is Required** checkbox is selected when the obligation is created and you will not be able to complete the obligation until a file is uploaded here.

5. Click **Mark as Complete**.

The obligation status moves to Complete and a notification will be sent to the appropriate owners and stakeholders.

Search for Obligation Attachments

Files related to an obligation can be attached when completing an obligation. If the **Documentation Is Required** checkbox was selected when the obligation was created, a file must be attached to the obligation before it can be marked as complete.

The **Obligations** tab on the **Attachments** page provides a quick way to find obligation attachments without requiring you to open each obligation.

You cannot add an attachment to an obligation from this page, but once an attachment has been added to an obligation on the contract, this page works in a similar way to contract attachments: you can download, delete, upload new versions of obligations attachments, and view the version history from this page. Unlike contract attachments, the attachment count in the left menu does not reflect obligation attachments and they do not print with the contract. For this reason, you are also not limited to printable file types.

Review Obligation Attachments in the Attachments Page

STEP-BY-STEP

1. Open the appropriate contract.

2. In the left menu, click **Attachments**.

3. Click the **Obligations** tab. Obligation attachments for the contract are displayed.

4. To modify the obligation attachment, highlight the obligation and select an option from the **Actions** menu.

Printing Contracts

You can download a PDF copy of the contract document and selected attachments. Downloaded copies of the contract can also be accessed from the Contract Import /Export screen for users with the appropriate permissions.

Download a PDF Copy of a Contract

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).
2. Search for and open the **contract** you want to print.

3. In the left menu, click **Open Main Document** then select **Download Full Contract as PDF**. A processing download window opens. **Note:** This action does not appear if there are no attachments associated with the selected contract. Once the PDF is ready to download, the window displays the file name.

4. Click on the **file name** to download and open the document.

The pdf file opens in your browser and can be opened or saved locally.

Access a PDF File from View Import/Export Results

The **Contract Manager**, **Contract Administrator**, **Contract Super User**, or **Export Search Results** permissions are required to access this page.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > View Import/Export Results**.
2. In the **Type** field, select **Full Contract as PDF**.
3. Click **Contract Actions > Download Full Contract as PDF**.
4. In the Status field, click **Completed.**
5. Click **Search**. A list of completed downloads appears.
6. Click on a **file name** to download and open the document.

The PDF file opens in your browser and can be opened or saved locally.

Review Rounds

The Review Rounds feature allows you to send a contract through multiple rounds of review by internal or external users before it is approved. Single or multiple reviewers can be selected for each review round.

Review rounds occur while the contract is in Draft status. The review process is slightly different for internal and external reviews.

INTERNAL REVIEWS

Once the contract is sent for review, internal reviewers will either see a Contracts to Review item in their Action Items menu, receive an eMACS Notification, and/or receive email notification, depending on their notification preferences. They are given temporary access to the contract to review and make edits as needed even if they do not have contract permissions to edit contracts. The contract's status is moved to Internal Review.

Once a reviewer selects **Done with My Review**, their individual reviewer's status is changed from "Sent" to "Done". They are still able to search for the contract, make edits, and select Edit My Comment while the contract is still in the Internal Review status. Once all reviews are complete, the status of the contract is set back to Draft. The contract manager will receive a notification at this time.

EXTERNAL REVIEWS

If you are sending a contract for external review, you need to manually manage the review process by sending an email to external reviewers with the contract attached and making changes to the contract on their behalf.

For external reviews, clicking Begin Round opens an email overlay where you can select who to send the contract to and what is included in the email to the external reviewer. Once the review round is started, the contract's status is moved to External Review. Contract managers will receive an action item for all contracts in this status.

Once the external reviewer has replied to the email, you can make changes to the contract on their behalf, then move the reviewer's status to "Done" by selecting **Done with Review**. Once all reviewers are done, the status of the contract is set back to Draft.

Send a Contract for Internal Review

This goal of this task is to send a contract to an internal user for review. You must be a contract manager or administrator to send contracts for review.

Note: Contract managers and administrators may use **Skip Reviewer** to tell the system to move to the next reviewer on the list (a status of Skipped will appear next to the reviewer's name). Click **End Round Now** to end the review round early and skip any reviewers who are not done.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or to the **Contracts Dashboard** if you have the appropriate permissions).
2. Search for and open the **contract** you want reviewed.
3. If the contract is not checked out to you, under **Contract Actions**, select **Check Out**.
4. In the left menu, select **Review Rounds**.
5. Click **Start Drafting Next Round**, then **Internal Review Round** to send the contract for review to other users in the system.
6. Click **Add Reviewer**.
7. In the User Search window, select the users you want to send the contract to for internal review and click Save Changes.
8. Click **Begin Round**. A confirmation window shows who has been selected for review.
9. Click **Begin Internal Review**. A status of "Sent or "Started" appears next to the internal reviewer. Internal reviewers will see "Contracts to Review" under their Actions Items menu, as well receive as a system generated notification. Click the information icon next to the status to see details about the review.

   As each reviewer completes their review, **Done** appears as their reviewer status on the Review Rounds page. Once all reviewers have responded, the review round will close. To add a new round, check out the contract again, add new reviewers, and begin a new round (start with step 4, above). When all review rounds are complete, the contract is ready to be submitted for approval.

Send a Contract for External Review

This goal of this task is to send a contract to an external user for review. You must be a contract manager or administrator to send contracts for review.

Note: Contract managers and administrators may use **Skip Reviewer** to tell the system to move to the next reviewer on the list (a status of Skipped will appear next to the reviewer's name). Click **End Round Now** to end the review round early and skip any reviewers who are not done.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or to the **Contracts Dashboard** if you have the appropriate permissions).
2. Search for and open the **contract** you want reviewed.
3. If the contract is not checked out to you, under **Contract Actions**, select **Check Out**.

4. In the left menu, select **Review Rounds**.

5. Click **Start Drafting Next Round**, then **External Review Round** to indicate that individuals without user access are reviewing the contract.

6. Click **Add Reviewer**.

7. In the Add Reviewer window, enter **contact information** for external reviewer, and click **Save**.

8. Click **Begin Round**. An External Review email window opens where you complete the information that you want to send to the external reviewer as follows:

- **Email Recipients** - Select the checkbox next to each reviewer that you want to send the email to. All external reviewers are listed and selected by default.

- **Attachments** - Select or clear checkboxes so that only the attachments that you want to send with the email are selected. All contract documents are listed (including the main document). Attachments that have been flagged to print with the contract in the Attachments screen are selected by default.

- **Include Full Contract PDF** - Select the checkbox if you also want to include the Full Contract PDF file in the email.

- **Email Content** - Standard text and placeholders appear in the fields by default. Modify text and placeholders as needed.

- Click **Send Email.** A status of "Sent or "Not Sent" appears next to the external review. Click the information icon next to the status to see details about the review.

9. Once the external reviewer has replied to your email, make changes to the contract on their behalf, and move their reviewer's status to Done for that review round. Steps are as follows:

- Once the external reviewer has replied to your email, make changes to the contract on their behalf.

- In the **Review Rounds** screen, open the external review round and click **Actions > Done with Review**.

- Enter notes about the review and click **Done with Review**.

As each reviewer completes their review, **Done** appears as their reviewer status on the Review Rounds page. Once all reviewers have responded, the review round will close. To add a new round, check out the contract again, add new reviewers, and begin a new round (start with step 4, above). When all review rounds are complete, the contract is ready to be submitted for approval.

Review a Contract (Internal Reviewer)

Depending on your user preferences, contracts that have been sent to you for review appear under **Action Items > Contracts to Review**, and/or **Notifications > Contract Ready for Internal Review**, or you may also receive an email notification with links to the contract.

STEP-BY-STEP

1. Open the contract to review by selecting **Action Items > Contracts to Review**, or **Notifications > Contract Ready for Internal Review**, or click the links provided in your email notification. A list of contracts that need to be reviewed or the contract that you selected to review opens, depending on your method of access.

2. If you accessed Action Items or Notifications, click on the **contract number** of the contract you want to review. The contract opens.

3. Review the contract. To make changes, check out the contract to make changes and check it back in once your changes have been made. You may also need to upload attachments or new versions of attachments during your review.

4. Once you have completed your review, select **Done with My Review**. This can be done either by going to **Contract Actions > Done with My Review**, or by going to the **Review Rounds** screen and selecting **Actions > Done with My Review** to the right of your name within the current round's table. The Done with My Review window opens.

5. Enter **notes** about the review.

6. Click **Done with My Review**.

Once all reviewers are done, the status of the contract is set back to Draft and the contract can no longer be accessed by internal reviewers who are not a contract manager or administrator. Contract managers will receive a notification that the contract has been reviewed.

Contract Users and Contacts

The Users and Contact page is used to define who has access to the contract.

Contract access is initially set by clicking Confidential or Normal on the contract wizard when you are creating a contract, and option chosen affects what appears in the Contract Users and Contacts screen as follows:

- If you have chosen **Normal** on the contract wizard when creating the contract, user access is inherited from the project. You can add internal users or external contacts, and set visibility controls, but you cannot remove users inherited from the project.
- If you have chosen **Confidential** on the contract wizard, any inherited contract managers, stakeholders, external contacts, and visibility settings will be removed from the contract, and only the **internal users** you select on this page will have access to the contract.

You can switch the Confidential or Normal setting on this page while the contract is in Draft status.

AREAS OF USER ACCESS

In addition to Normal and Confidential settings, user access is defined on the Users and Contacts page as follows:

- **Internal Users** - These are internal users who have access to the contract. You can add users individually, by role or by department or by business unit (for stakeholders only), but individuals on a role or department list will not automatically receive notifications regarding the contract. You control the type of access they have to the contract by adding them to one of the following categories:

- **Contract Managers** - These users have full control over the contract. The person who created the contract is always a contract manager by default.

- **Contract Administrators** - These are internal users who have been named as contract administrators on the contract project. Naming a user as a contract administrator on the project will grant that user contract manager access to all contracts created within that project. If a contract is using normal settings, you cannot add or remove contract administrators inherited from the project. If a contract is using confidential settings, contract administrators are removed from the contract and cannot be added.

- **Stakeholders** - These users can view the contract summary only and receive notifications.

- **Visibility Controls** - Define what users who are not contract managers assigned to the contract can see on the Contract Summary page. What is visible on the contract summary is highly configurable and will vary from agency to agency. See Configuring the Contract Summary Screen.

- **External Contacts** - These are individuals outside of your agency who may have an interest in the contract and who you want to receive email notifications. You can create external contacts and link them to a contract party profile. External contacts are shared between all contracts - if you create a new external contact, that contact will be available for assignment to other contracts.

Define Contract Access on the Users and Contacts Page

Follow these steps to define who has access to a contract.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the contract you want to update.

3. In the left menu, click **Users and Contacts**.

4. (optional) While the contract is in Draft status, you can switch the access settings by clicking the **Make Confidential** button to change contract access from normal to confidential, or the **Make Not Confidential** button to change contract access from confidential to normal.

- If you make the contract **Confidential**, any inherited contract managers, stakeholders, external contacts, and visibility settings will be removed from the contract, and you need to add the **internal users** who can access the contract in step 3 below.
- If you want the contract to use **Normal** settings, user access is inherited from the project by default. You can add Internal Users or External Contacts, and set Visibility Controls, but you cannot remove users inherited from the project.

5. Under **Internal Users**, select the users who will have contract manager or stakeholder access to the contract by clicking **Edit Users** in the appropriate area. Click the icon next to a name to remove a user from selection. You will not be able to remove users inherited from the project.

- **Contract Managers** - Internal users who have full control over the contract. The person who created the contract is always the contract manager by default.
- **Stakeholders** - Internal users who can view the contract summary only and receive notifications.

6. Under **Visibility Controls**, define what users other than the contract manager can see on the Contract Summary page. Options are **Full**, **Partial** or **Limited**. Click **Preview** next to a setting to check what users with the permission can see.

- **Users Who May Manage Other Contracts** - Users who have the contract manager user role permission, but are not named as a contract manager on this contract.
- **All Other Users** - These are users who have access to the contract because they are named as stakeholders on the project or contract.

Options are **Full**, **Partial** or **Limited**. Click **Preview** next to a setting to check what users with the permission can see.

7. Under **External Contacts**, select the individuals outside of your agency who can receive email notifications by clicking **Add Contacts**, selecting **individuals**, then clicking **Add to Contract**. Click the icon next to a name to remove an individual from selection.

Note: You can also click the **Edit External Contacts** link to create a new external contact. See Create a New External Contact for a Contract below.

8. Click **Save Changes**.

Create a New External Contact for a Contract

External contacts are individuals outside of your agency who may have an interest in the contract and who you want to receive email notifications. When a contract is configured to send emails to external contacts, the emails are automatically sent to the email addresses specified. External contacts added to a contract cannot opt out of receiving notifications, but you can remove them from the list if they no longer need to receive the emails.

You can create external contacts from the Users and Contacts page and link them to a contract party profile. External contacts are shared between all contracts - if you create a new external contact, that contact will be available for assignment to other contracts.

When creating an external contact, you also have the option to link the external contact to existing contract parties (vendors). If you do this, the external contact is automatically added to the Users and Contacts screen whenever the contract party is selected on a contract header. If the contract is using normal user access settings, the external contact can only be deleted from the contract while it is in Default status by removing the vendor link.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the **contract** you want to update.

3. In the left menu, click **Users and Contacts**.

4. Click the **Edit External Contacts** link under the External Contacts heading.

5. Click the **Create New Contact** button.

6. Enter contact information in the appropriate fields.

7. Click **Save**.

8. (optional) Complete the following steps to connect the contact to a contract first or second party (vendor).

Note: If you do this, the external contact is automatically added to the Users and Contacts screen whenever the contract party is selected on a contract header. If the contract is using normal user access settings, the external contact can only be deleted from the contract while it is in Default status by removing the vendor link.

- Click the **Add a Vendor Link** button.

Note: Click **remove vendor link** to disconnect the external contact from the vendor.

- Search for the vendor, and click the **select** link on the right of the record.

- Click **Return to Contract.**

Configuring Contract eProcurement Information

WHAT IS EPROCUREMENT INFORMATION?

The eProcurement section on a contract contains all information and configurations related to shopping from a contract, such as budgeting, spend, applicability, related goods and services, and PO clauses. This is also where users make a contract active for shopping.

The following pages on a contract allow you to configure this information:

- eProcurement Setup
- Budget and Spend
- Applies To
- Goods and Services
- PO Clauses

eProcurement Setup

Configuring the Main Details of eProcurement Setup

The goal of this task is to configure the main details for eProcurement setup.

STEP-BY-STEP

1. Open the appropriate contract for editing. Check out the contract if it is not checked out to you.

2. In the left menu click **eProcurement Setup**. The **eProcurement Setup** page opens.

3. Configure the main details in the top section as follows:

- **Active for Shopping** - This field defaults to **No**. Click the **Yes** radio button to indicate the contract can be viewed and used once effective. The Active status is the contract's general status (as opposed to its Effective status). Only Active contracts are available to add to line items. If it is necessary to "expire" a contract prior to its official expiration date, simply inactivate it.

- **Restrict Products To** - By default, this field is set to **Any Vendor Product** which means all of the vendor's products apply to the contract. To limit the contract to only specific products, select **Only for Specified Products, SKUs or UNSPSCs**.

- **Automatically Apply Purchases from this Vendor to this Contract (ALWAYS NO)** - in eMACS, always answer NO to this statement.

  To make a contract automatically be associated with a line item in a cart if certain criteria is met, click the **Yes** radio button. This option is HIGHLY recommended if there will only be one contract for the vendor AND all purchases are from this contract. For example, if your organization has a general contract for computers from Dell, you may choose to Apply Automatically. If this option is not selected, the user (requisitioner, approver, or buyer) must manually associate the line item(s) with the contract. In the event that there are multiple applicable contracts for a single line, there is a hierarchy in terms of which the system will apply:

  a. The user is a contract manager for the contract.
  b. The user is explicitly listed in the "By User" table for the contract.
  c. The user's department is explicitly listed in Available Departments.
  d. The user's role is explicitly listed in Available Roles.
  e. The contract with the oldest activation date.
  f. Alphabetical by contract name.

- **Blanket PO Number** - If you would like to use a Blanket (Standing) Purchase Order number each time the contract is used, enter the number in Blanket PO Number field.

4. Click **Save Changes** to save your work and remain on Setup page. Click **Next** to save your work and move to the next page.

Pricing (Price Set/Hosted Catalog Configuration)

This goal of this task is to configure the price set options for the contract.

STEP-BY-STEP

5. Open the appropriate contract for editing. Check out the contract if it is not checked out to you.

1. In the left menu click **eProcurement Setup**. The **eProcurement Setup** page will open. Locate the **Pricing** section.

2. Configure the fields:

- **Needs Price Set** - Click **Yes** to indicate that the contract is associated with a hosted catalog (price file).
- **Associated Price Set** - Click the **Select Price Set** button to choose the vendor price file to associate with the contract. Available price sets display for you to select from.

3. Click **Save Changes** to save your work and remain on Setup page. Click **Next** to save your work and move to the next page.

Administrative Fee

The goal of this task is to configure the **Administrative Fee** section. The Administrative Fee is a price markup percentage that can be assigned to hosted catalog items within the contract. When the markup is applied, the percentage will be added to all hosted catalog items. The contract price plus the markup percentage will display in search results, be applied to items in the cart and distributed to the contracted vendor. The shopper will not see the markup amount per item. The markup percentage can be applied to the entire agency or by business unit. **Note**: The percentage does not apply to Forms and Non-Catalog Items defined on the contract.

STEP-BY-STEP

1. Open the appropriate contract for editing. Check out the contract if it is not checked out to you.

2. In the left menu click **eProcurement Setup**. The **eProcurement Setup** page opens.

3. Configure the Administrative Fee section:

- Choose the appropriate radio button to apply an agency fee or a business unit fee. **Note:** The fee can be set for both levels.
- In the **Organization Fee** field, enter the mark-up percentage.

4. Click **Save Changes** to save your work and remain on Setup page. Click **Next** to save your work and move to the next page.

Display Options in Browse Contracts

The goal of this task is to configure the **Display Options in Browse Contracts** section. The **Show Generic Non-Catalog Item in Browse Contracts** field determines if the contract's items will be listed when a user who chooses to display associated forms and non-catalog requests searches for contracts. **Note**: If you have not enabled non-catalog entry, this field will not be visible.

STEP-BY-STEP

1. Open the appropriate contract for editing. Check out the contract if it is not checked out to you.

2. In the left menu click **eProcurement Setup**. The **eProcurement Setup** page opens.

3. Configure the field:

- Click the **Yes** radio button to display the contract.

- Click the **No** radio button to prevent the contract from being displayed. **Note:** Choosing to not display the contract does not prevent users from making non-catalog item purchases against a contract, but only prevents the non-catalog option from displaying when the user is browsing through contracts.

- Click the **Inherit from Contract Type** radio button to inherit the setting from the assigned contract type. **Note:** The current setting for the contract type displays to the right of the option.

4. Click **Save Changes** to save your work and remain on Setup page. Click **Next** to save your work and move to the next page.

Contract Budget Setup

The **Budget and Spend** page is used during **contract creation** to enter the contract budget and set minimum/maximum limits for contract spend and line item quantities. These settings will trigger validation messages when assigning the contract to requisitions, purchase orders or invoices. The contract budget and minimum/maximum limits are usually set during contract creation, but can be revised at any time.

BUDGET AND ENFORCE BUDGET

The value entered in the **Budget** field is the expected total spend amount for the contract for the current renewal period. This figure is used as a benchmark to compare to actual spend figures as users associate line item spend with each contract. It also is used in remaining budget calculations that show the budget in relation to spend assigned to the contract. The budget can be updated at any time. When a contract is renewed, the existing budget amount is copied to the renewal.

The **Enforce Budget** option is used to indicate that the contract budget should be evaluated when users place orders for items associated with the contract. If set to Yes, validation checks will compare line item totals on requisitions, purchase orders and invoices against the contract budget. If the total from all lines assigned to the contract on the document is greater than the remaining budget on the contract, an error or warning will appear. The Enforce Budget option may also be used with workflow process configuration to route the order to a specific approval folder if the contract budget is exceeded with the order. **Note:** Workflow and/or Cart changes are required to take advantage of this feature.

INVOICE AND REQUISITION LIMITS

These two sections are used to set minimum and maximum limits for contract spend and line item quantities. If set up for your organization, limits entered here will trigger validation messages when assigning the contract to requisitions or invoices. These settings are used with document setup validation rules in order to trigger warning or error messages to shoppers or assigned approvers, and with workflow process configuration to route the order to a specific approval folder.

Set Contract Budget and Minimum/Maximum Limits

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the appropriate contract for editing. Check out the contract if it is not checked out to you.

3. In the left menu, select **Budget and Spend**.

4. Complete the contract budget fields as follows:

- **Budget** - Enter the expected total spend amount for the contract for the current renewal period.
- **Enforce Budget** - Click the **Yes** radio button to indicate that the contract budget should be evaluated when users place orders for items associated with the contract. **Note:** Workflow and/or Cart changes are required to take advantage of this feature.

5. (optional) In the **Limits Per Requisition** section, complete the following fields to set minimum and maximum limits for requisitions. Limits entered here will trigger validation messages when assigning the contract to requisitions:

- **Contract Spend - Minimum Allowed** - Enter a value here (greater than 0) if you would like purchases assigned to this contract to be a minimum dollar amount per purchase requisition. If the cost of the items against this contract on the order do not meet the minimum listed amount, a warning or error is indicated on the requisition. For example, if the value is $200.00, and a single order has items against the contract that are $100, the agency may configure that the shopper receive a warning or error before submitting the order, or that the order routes in workflow for approval.

- **Contract Spend - Maximum Allowed** - Enter a value here (greater than 0) if you would like purchases assigned to this contract to be limited to a specific dollar amount per purchase requisition. If the cost of the items against this contract on the order exceed the listed amount, a warning or error is indicated on the requisition. For example, if the value is $200.00, then if a single order has items against the contract that exceed $200, the agency may configure that the shopper receive a warning or error before submitting the order, or that the order routes in workflow for approval.

- **Line Item Quantity - Minimum Allowed** - Enter a value here (greater than 1) if you would like purchases assigned to this contract to be a minimum quantity per line item. If the quantity of items does not meet the minimum listed amount, a warning or error is indicated on the requisition. For example, if the value is 4, and a single order has an item with 2 as the quantity, the agency may configure that the shopper receive a warning or error before submitting the order, or that the order routes in workflow for approval.

- **Line Item Quantity - Maximum Allowed** - Enter a value here (greater than 0) if you would like purchases assigned to this contract to be limited to a specific quantity per line item. If the quantity of items assigned to the contract on the order exceeds the listed quantity, a warning or error is indicated on the requisition.

6. In the **Limits Per Voucher** section, choose one of the following options. If set up for your organization, limits entered here will trigger validation messages when assigning the contract to invoices:

- Select the **Same as Requisitions** checkbox if you want the same limits that have been entered for requisitions to also apply to vouchers. If the checkbox is selected, the Limits Per Voucher section will collapse, and values entered in the Limits Per Requisition section will be used for vouchers. If the checkbox is blank, the Limits Per Voucher section will expand and values entered in Limits Per Voucher section will be used for vouchers.
- Leave the **Same as Requisitions checkbox** blank if you want to enter minimum and maximum limits that will apply to vouchers only, then complete the Minimum Allowed and Maximum Allowed fields for contract spend and line item quantity.

7. Click **Save Changes**.

Adjust Contract Spend

You can adjust PR Spend, PO Spend and Invoice Spend levels on a contract. Adjusting these amounts allows you to account for purchases made outside of the system or made prior to the entry of the contract. Adjustments affect the contract only, it does not change amounts on the associated requisitions, purchase orders or invoices.

Keep in mind that the totals for these documents may not match the total spend because you may have only certain line items associated with a contract.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the appropriate contract for editing.

3. In the left menu, select **Budget and Spend**.

4. In the **Actual Spend by Version** section, click **Adjust** on the row of the contract version you want to adjust.

5. Select the **Adjustment Type** (Requisitions, Purchase Orders or Invoices).

6. Enter the amount to add to or subtract from the **existing value**. For example, if the current amount is $10.00 and you enter 1 in this field, the value will change to $11.00. If the current amount is $10.00 and you enter - 1, the value will change to $9.00.

7. Add a **note** for later reference.

8. Click **Save Changes**.

Contract Lifetime Spend

For agencies using eProcurement, the **Lifetime Spend** link on contracts shows a summary of contract spend calculated for all versions of the contract. Contract administrators and contract managers can quickly view contract spend totals and make decisions about future spending without navigating away from the contract.

Click **Lifetime Spend** in the top left corner of a contract (i.e., the "sticker" section) to display a summary of all spend assigned to the contract from purchase requisitions, purchase orders, and invoices:

- PR, PO and Invoice spend totals are calculated for **all versions** of the contract, including renewals and amendments. **Note:** For agencies using Contract Compliance Tracker only, the Lifetime Spend totals will not include amendments as CCT does not use amendments.

- Totals include both **committed and actual spend** for all contract statuses.

- Totals incorporate any **adjustments** made in the Actual Spend by Version table on the Budget and Spend page.

- Lifetime Spend totals are updated on all contract versions, so the amounts displayed remain constant no matter which version is open. For example, if the original contract has $100 in invoice spend, and a renewal adds $50, the Lifetime Spend **Invoice:** total will show $150 on the original contract, all renewals, and all amendments.

- Click the **Details...** link to open the **Actual Spend by Version** table on the Budget and Spend page of the contract, where you can view a complete breakdown of spend totals by contract version.

Lifetime spend totals are also displayed in the **Lifetime Summary** bar chart on the Budget and Spend page. You can toggle the renewal and amendment versions listed in the legend on and off so that the bar graph only shows data for the selected version(s).

Depending on your system settings, it may take up to 24 hours for the Lifetime Spend and Actual Spend by Version totals to reflect new PR, PO and Invoice Spend amounts assigned to the contract.

View Lifetime Spend

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the appropriate contract.

3. Click **Lifetime Spend** in the top left corner of a contract (i.e., the "sticker" section) to display a summary of all spend assigned to the contract from purchase requisitions, purchase orders, and invoices.

4. *(Consortium members only)* Click **Lifetime Member Spend** to view spend totals for member agencies. For parent agencies, the totals show the total contract spend by all consortium members. For member agencies, totals only show spend for the agencies that you have published the contract to.

5. (optional) Click the **Details...** link to open the **Actual Spend by Version** table on the Budget and Spend page of the contract to view a breakdown of spend totals by contract version. Consortium parents and members will also see a **Published Member Spend** table that contains information specific to consortium members.

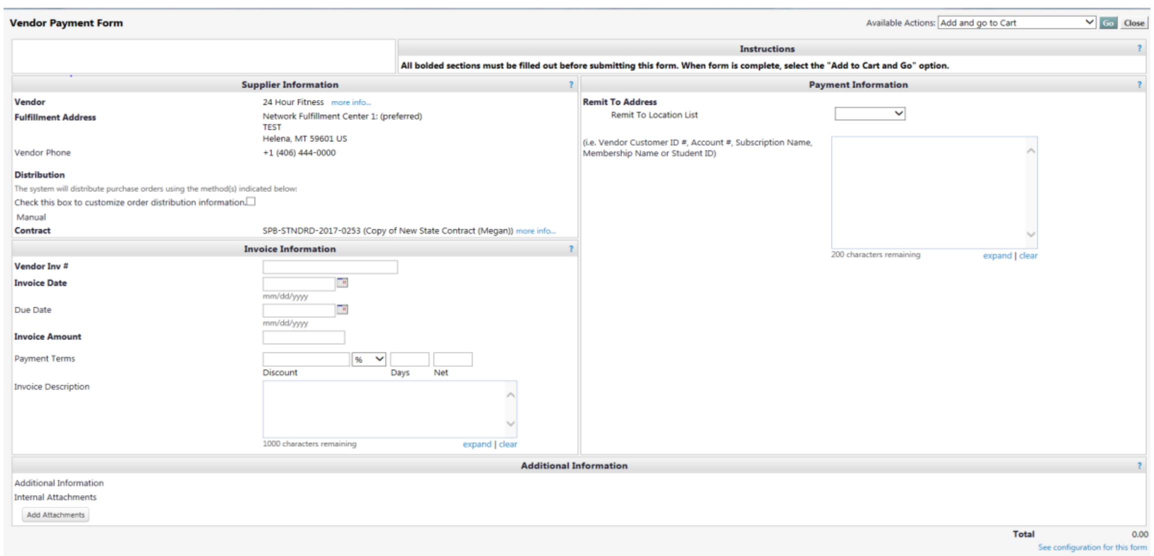
Making a Payment/Tracking Spend

To make a payment against a contract:

1. Open the appropriate contract.

2. Click on Summary.

3. Expand the Goods and Services section. Click on Vendor Payment Form. Complete all bolded sections of the Vendor Payment Form before submitting.

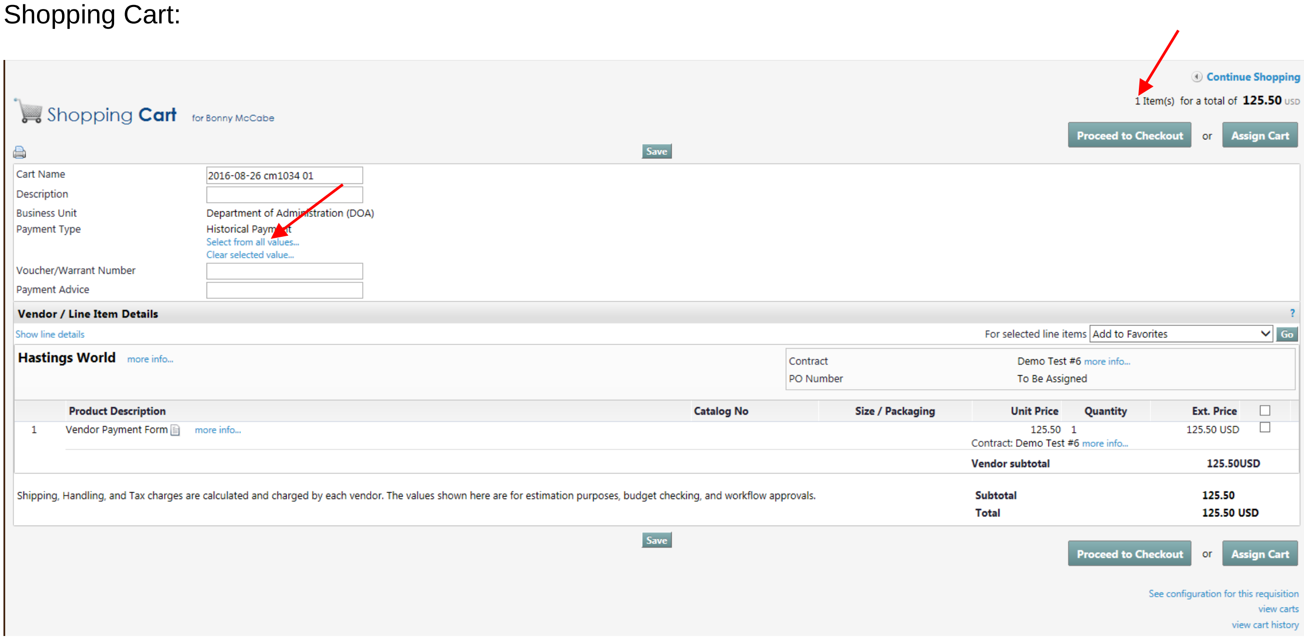


- Supplier Information:
  - Vendor (*required*) –vendor name field pre-populates with vendor's name
  - Fulfillment Address (*required*) – vendor fulfillment address pre-populates with vendor's fulfillment address information
  - Vendor Phone – if available, vendor phone number will pre-populate the Vendor Phone field
  - Distribution – how the vendor receives purchase order information
  - Contract – a link to the contract is provided
- Invoice Information:
  - Vendor Inv # (*required*) – provide an invoice number
  - Invoice Date (*required*) – enter a date
  - Due Date – due date of invoice
  - Invoice Amount (*required*) – the amount of payment being made
  - Payment Terms – enter any payment terms information
  - Invoice Description – enter any invoice description information
- Payment Information:
  - Remit To Address (*required*) – select remit to address in drop-down box. This information from the vendor's registration profile. If there is no remittance address contact the eMACS support unit, emacs@mt.gov.

- ○ Box – enter any additional vendor information
- Additional Information:
  - ○ Internal Attachments – add attachments, such as copy of scanned invoice, to vendor payment by clicking on Add Attachments

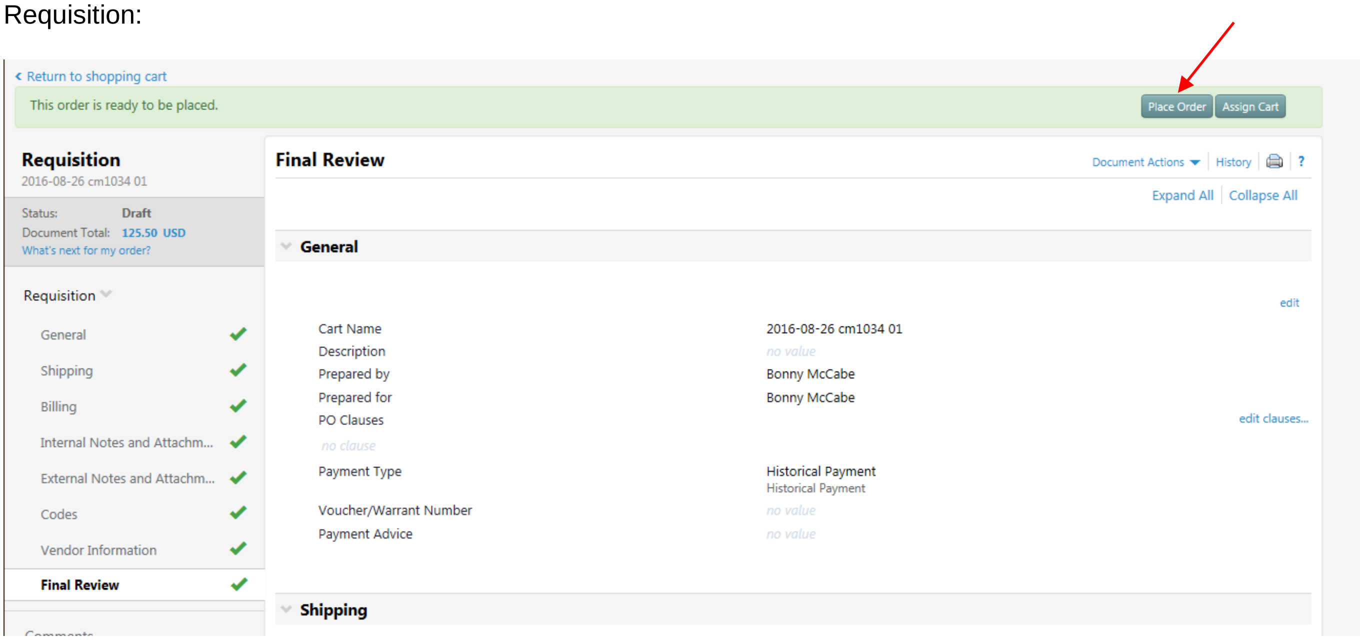
4. Once all required fields have been completed, in the upper right-hand corner of the payment form is the Available Actions field. Select Add and go to Cart, click Go.

Shopping Cart:

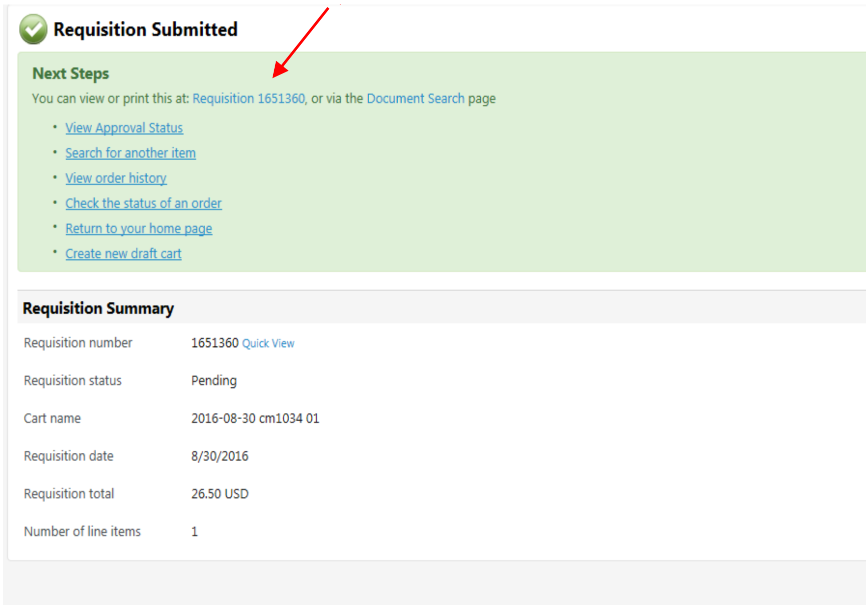


5. In the Shopping Cart window, under Payment Type, click on Select from all values.... Select Historical Payment. Click Save.
6. Click on Proceed to Checkout.

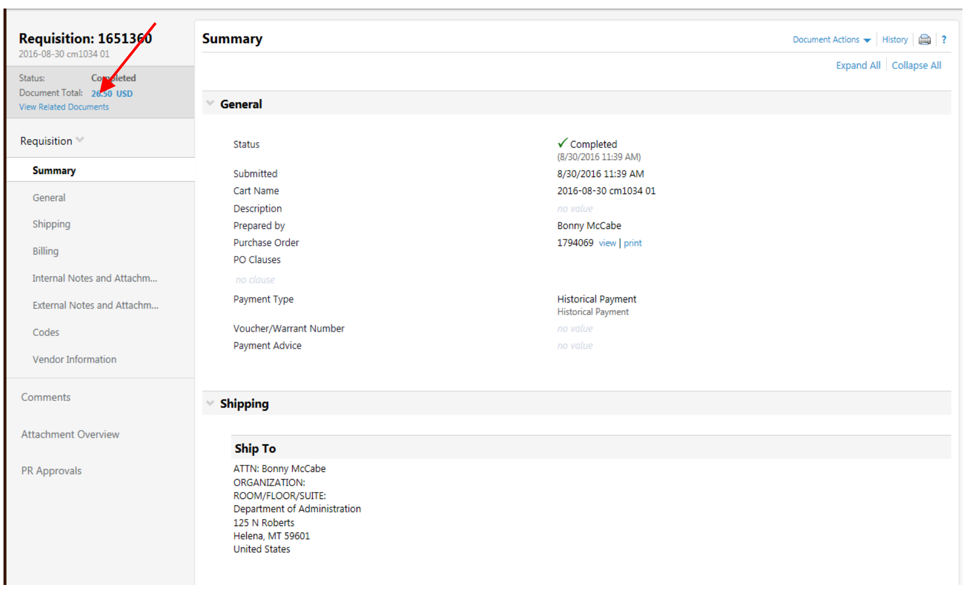
Requisition:



On the Requisition page, in the right-hand corner click on Place Order.



7. At the screen above, click on the requisition to view related documents.



8. At the screen above, click on View Related Documents to access or view other related documents.

9. To get back to the contract, click on View Related Documents, then Purchase Order. At the bottom of the screen, under Lines, click on more info... This will open up the Vendor Payment Form used to make the payment. Click on more info... next to the contract title.

Configuring Contract Applicability for Users, Products and Vendor Fulfillment Centers

When configuring a contract, an important step is configuring contract applicability. The application allows you to set up how the contract applies to Departments/Roles/Business Units, Users, Product/SKU, UNSPSC and Fulfillment Centers.

Applying the Contract to Users based on Department, Role or Business Unit

You can define which specific departments and/or roles are allowed to use a contract. For example, a contract with Dell computers may only be used by individuals in the IT department. Contract access can also be granted at the role-level. For example, some organizations use roles to identify different physical locations (City 1, City 2), so you can use the combination of role and department to indicate that only the Chemistry department at Campus B can use the contract. Keep in mind, the department selection is derived from the department selected in the user's profile. Additionally, you can make the contract available only to specific business units. For example, you might have a catering vendor who is available only in North Carolina. You could make a contract with that vendor available only to the North Carolina business unit.

STEP-BY-STEP

This goal of this task is to apply a contract by department, role or business unit. **Note**: If you wish to allow all users to have access to the contract, no action is necessary.

1. Open the appropriate contract for editing. Check out the contract if it is not checked out to you.
2. In the left menu, click **Applies To**. The **Applies To** page opens with the **Department or Role** tab open.
3. If not already enabled, click the **Grant access to this contract using Departments and Roles** checkbox. Available Business Units, Available Departments and Available Roles are displayed on the page.
4. Select the appropriate values from the left side of the window and click the button to move the department or role to the right side of the screen. The departments, roles or business units with access in the right side of the window.
5. Click **Save Changes** to save your work.

Applying the Contract to Specific Users

You can give specific users access to a contract.

STEP-BY-STEP

Note: eMACS Support suggests using Users and Contacts to give contract access to additional users.

This task describes how to assign contract access to one user. **Note:** A user must have access to a contract before they can view it on a form. For example, if a form is used to create a requisition and is linked to a specific contract when the user fills it out, the approver or prepared-for user must also have access to the linked contract before they can move the form containing the contract through workflow.

1. Open the appropriate contract for editing.
2. In the left menu, click **Applies To**. The **Applies To** page opens.
3. Click on the **Additional Users** tab. If there are currently users assigned access to the contract, the user names are displayed.
4. To add a user click the **Add Users** button and follow the steps to add the user.
5. Click **Save Changes** to save your work.
6. To remove a user, click to the left of the user's name.

Applying the Contract to Specific Products/SKUs

You can associate a contract with one or more products (using catalog numbers) from a vendor. Once a catalog number has been associated with a contract, any time the item is ordered, the contract number can be automatically assigned to the purchase and the spend tracked to the contract. This functionality is important when contracts are associated with only a portion of the vendor catalog or when tracking spend for blanket orders. This functionality can be used for hosted, punch-out and non-catalog items. In addition, organizations can use this functionality to "audit" pricing.

STEP-BY-STEP

This goal of this task is to assign products/skus to the contract.

1. Open the appropriate contract for editing.

2. In the left menu, click **Applies To**. The **Applies To** page opens.

3. Click on the **Product/SKU** tab. If there are currently products associated with the contract they will display. Before adding a new product, you should first confirm that the product has not already been assigned to the contract. If there are a large number of products, you can search for the product by Catalog Number/SKU or Description.

4. To add a product, click the **Add Product/SKU** button.

5. If this applies to a hosted catalog, enter the catalog number and then click the search icon. If the product is not found, or if this is a punch-out or non-catalog product, complete the description as well as the remaining fields.

Important:

For applicability rules, the system first looks to see if there is a product number match with the catalog number. If there is a match the application will then look to see if there is a vendor size designated for the product with a contract. If a vendor size is included in the contract the application will then apply that to the match criteria. Next, the system will look to the packaging size and finally the color. Agencies need to have an understanding of the vendor's catalog to determine which fields should be included to determine unique products. For example a vendor may use the same catalog number for 3 hole punch paper, but then designate one as a pack (150/pack), one as ream, and one as a case. Many vendors will designate these with different catalog numbers. If so, the catalog number is the only field that should be needed in the Product Association. However, if the catalog number is not unique, the catalog number plus the vendor packaging must be used to determine if the contract should apply.

6. To remove products, click the checkbox in the far-right column for each appropriate product and then click the **Remove Selected** link.

IMPORTING/EXPORTING APPLICABLE PRODUCTS

You can import and export products associated with the contract. The import feature is helpful when you want to associate multiple products. To import or export products, click on the Import/Export sub-tab. The **Detailed Contract Product Import Instructions** guide located on this tab provides detailed instructions.

Applying the Contract to Specific UNSPSC Codes

You can define a list of UNSPSCs that apply to the contract. When a USNSPC is associated to a contract, any time an item is ordered from the contract's vendor that matches the UNSPSC on the contract, the contract number can be automatically assigned to the purchase and the spend tracked to the contract. This functionality is important when contracts are associated with specific categories within the vendor's catalog, especially if the products within those categories change frequently. This functionality can be used for hosted, punch-out and non-catalog items.

STEP-BY-STEP

This goal of this task is to apply the contract to specific UNSPSC codes.

1. Open the appropriate contract for editing.
2. In the left menu, click **Applies To**. The **Applies To** page opens.

3. Click on the **UNSPSC** tab. If there are currently codes assigned to the contract, the codes are displayed.

4. Enter a value in the UNSPSC field. The field auto-completes as you enter the UNSPSC.

5. Click the **Add UNSPSC** button. The code will be added.

6. To remove UNSPSC code, click the checkbox in the far-right column for each appropriate code and then click the **Remove Selected** link.

Applying the Contract to Specific Fulfillment Centers (Vendor Addresses)

In some cases, you may have a contract that is only applicable to one or more fulfillment centers for a vendor. For example, DoubleTree hotels might be listed as a single vendor with multiple locations throughout the country. You may have a special $79/night agreement with DoubleTree for the hotel closest to you. In this case, you would want to indicate on the contract which location applies to the agreement. **Note:** If the vendor or contract party has not created fulfillment centers, this task is not applicable.

STEP-BY-STEP

This goal of this task is to limit the contract to specific fulfillment centers.

1. Open the appropriate contract for editing.

2. In the left menu, click **Applies To**. The **Applies To** page opens.

3. Click on the **Fulfillment Center** tab. If there are currently fulfillment centers assigned they will be displayed in the Fulfillment Address(es) Assigned to this Contract window on the right.

4. To add fulfillment centers, click the appropriate values from the **Available Fulfillment Addresses** window on the left and click .

5. Click the **Save Changes** button to save your work. Note: If you do not select specific fulfillment centers the contract will apply to all fulfillment centers.

Configuring Contract Goods and Services (Forms, Non-Catalog and Other Items)

In addition to catalog items, you are able to associate other types of items to the contract. This functionality is managed through the **Goods and Services** page. You can apply forms and non-catalog items that can be ordered through the application. In addition, you can provide instructions for ordering items outside of the application.

Associating a Form with a Contract

With this feature, you can associate a form with a contract type, create a 1:1 relationship where you have a single form associated with a single contract or multiple contracts, and pre-fill several different forms and associate all of them to a contract for shoppers to select. For example, you may associate your Service Form with the contract type "Services" so that all services contracts will inherit this form. Or if you have a unique Service Form for a specific vendor, you could do a 1:1 association on the contract in this case. Or if you have a vendor agreement for different services under the contract, you could create a form for each service and associate each of the forms to the contract.

Note: A user must have access to a contract before they can view it on a form. For example, if a form is used to create a requisition and is linked to a specific contract when the user fills it out, the Approver or Prepared-for user must have access to the contract on the form before the form containing the contract will move through the workflow.

STEP-BY-STEP

This goal of this task is to associate forms with a contract. **Note**: This task assumes that there are forms created for your organization.

1. Open the appropriate contract for editing.

2. In the left menu, click **Goods and Services**. The page will open with the **Forms** tab active.

3. In the **Options** section click the **Yes** radio button for the **Show Contract forms in Product Search Results** field to allow users to search for the form and locate it via product search (this is the typical configuration).

4. Existing forms are displayed in the **Contract Forms** section. A default form that is inherited from the contract type associated with the contract is automatically associated. Click the **view form availability** link to view and access the locations where the form has been assigned in other areas of the application.

5. To add a form, click the **Add Form** button.

6. A pop-up window containing all active forms displays. You can preview the form by clicking ▾ on the associated **Select** button and selecting **Preview**. To choose the form, click **Select**.

7. You can add the form to your favorites by clicking on the associated **Add to Favorites** button.

8. Click **Save Changes** to save your work.

To remove a form from the contract, click the ▾ on the associated Add to Favorites button.

Adding Ordering Instructions to a Contract for Items Procured Outside of the Application

You can associate ordering instructions for items or services purchased outside of eMACS. With ordering instructions, you can provide step by step instructions to users on how to purchase an item or service using the contract. For example, you can provide instructions on how to rent a car from a contracted car service. When a shopper with access to the contract enters search terms that match the contract, the ordering instructions will be returned in the search results.

STEP-BY-STEP

This goal of this task is to add ordering instructions for contract items or services outside of eMACS.

1. Open the appropriate contract for editing.

2. In the left menu, click **Goods and Services**.

3. Click the **Ordering Instructions** tab.

4. Click the **Yes** radio button for the **Display in Product Search Results** field if you want to allow contract-specific ordering instructions to be displayed directly in product search results when a user enters search terms that result in a match to the contract.

> **Note:** When ordering instructions appear in product search results, they do not have an Add to Cart button because these purchases typically happen outside of SciQuest. In order to apply the spend to your contract in the system, make a manual adjustment on the contract's spend when the order is invoiced.

5. Enter a concise description in the **Product Description** field. This is the top line displayed in the product search results and is indexed for search.

6. Enter any additional text in the **Additional Information** field. This field should contain any additional information about the product. Format the text using the available formatting options.

7. In the **Ordering Instructions** dropdown, select how and when you want ordering instructions to be displayed in the product search results:

- **None** - Select this option if the information you provided above is sufficient and you do not need to include any additional instructions.
- **Use Attachments** - Select this option if you would like to attach documents or URL links to the ordering instructions. You can include multiple attachments.

- **Use Rich Text** - Select this option if you want to display the ordering instructions in a pop-up window to the user. Enter and format the text in the provided area.

8. Choose if you want an image to display with the ordering instructions in your search results.

9. Click the **Save Changes** button to save your work.

10. Click the **Preview** button in the top-right corner to preview your ordering instructions.

Adding Non-Catalog Items to a Contract

When a contract covers a set of products that are not provided in a catalog by the vendor or contract party, a contract administrator can add these products as non-catalog items to the contract. There are two main differences between contract non-catalog items and regular non-catalog items. First, the details of contract non-catalog items cannot be edited by shoppers. And second, contract non-catalog items can only be purchased under contract and are therefore hidden from customers who do not have access to the contract, and the contract is always automatically applied to the item on the cart. **Note**: Contract non-catalog items are not used in place of a hosted catalog because they have a limited set of item attributes and they can only be administered by users with access to the contract.

Contract Non-Catalog Items can be added manually through the user interface described below, or they can be imported by clicking on the **Import/Export** tab. For more information on how to import products, please refer to the **Contract Non-Catalog Item Import Guide**, which is available on the Import/Export sub-tab.

STEP-BY-STEP

This goal of this task is to assign non-catalog items to the contract.

1. Open the appropriate contract for editing.

2. In the left menu, click **Goods and Services**.

3. Click the **Non-Catalog Items** tab.

4. If there are any existing non-catalog items they will display on this page. To add a new item, click the **Add Contract Non-Catalog Item** button.

5. Add details about the product in each of the fields. These contract items should be as detailed as possible.

6. Click the **Save** button to save the information. **Note:** It may take several minutes for the non-catalog item to show in search results.

7. To remove non-catalog items, click the far-right checkbox for all of the appropriate items and then click Remove Selected.

Adding PO Clauses to a Contract

PO clauses can be used by an agency to place special verbiage on faxed and emailed purchase orders. PO clauses are also referred to as PO Terms. These represent special conditions the vendor should reference regarding the order. An order may contain none, one, or more PO clauses. Clauses can be set up at the agency-wide level, at the vendor level, fulfillment-center level, or contract level. When a PO clauses are included with contracts, they will display on the purchase order each time a PO is generated from the contract.

STEP-BY-STEP

This goal of this task is to add PO clauses to a contract. **Note:** This task assumes that PO clauses have been created and are available for selection.

1. Open the appropriate contract for editing.

2. In the left menu, click **PO Clauses**. The available PO clauses are listed on the page, showing the Clause No. (number), Clause Name and Clause Text.

3. Click the checkbox in the **Assigned** column for each clause you would like to add to the contract.

4. Click **Save Changes**.

MANAGING CONTRACTS

Approve a Contract

Contract approvals are used when contract workflow requires that the contract be manually approved by a contract approver. The logic and frequency of those approvals will depend on your agency's contract workflow.

FINDING CONTRACTS THAT NEED APPROVAL

There are a few different ways to find contracts that need your approval.

- Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions) to search for and open the contract that needs approval.
- Click the **Action Items** icon at the top of the screen next to your user name to view a list of all approval items that you are able to complete. Clicking **Contract Approvals** will take you to the Orders and Documents > Approvals page.
- Navigate to **Orders and Documents > Approvals > My Approvals**. From there you can use filters to display a list of contracts you can approve.
- You may receive an email notification requesting contract approval.

Whatever method you use to find the contract, the steps required to approve the contract are similar, though the buttons are in slightly different places.

NEXT STEPS

Before you start reviewing a contract, **assign the contract** to yourself to prevent another approver from approving the contract at the same time. This step is required if the contract is in a shared approval folder.

Once you have reviewed the contract, you will need to decide what you want to do with it. The options vary according to which page you are approving the contract from:

Contract Actions Menu

- **Approve** the contract to send it to the next step in the workflow.
- **Forward** the contract to another approver for review.
- **Return to Draft** status if the contract needs revision.

Orders and Documents Approvals Page

- **Approve** the contract to send it to the next step in the workflow.
- **Return to Shared Folder** to return the contract to its shared folder where another approver can review it. This option is only available if you have assigned the contract to yourself.
- **Put Request on Hold** to temporarily stop the contract from moving through workflow steps.
- **Forward To...** if you want to send the contract to another approver for review.

Approve a Contract from the Contract Actions Menu

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions)
2. Search for and open the **contract** you want to approve.

3. (optional) To prevent another approver from approving the contract at the same time, expand the **Contract Actions** menu in the top right corner of the screen and select **Assign to Myself**.

> **Note:** Assigning the contract to yourself is required if the contract is in a shared approval folder.

4. Review the contract.

5. Expand the **Contract Actions** menu and choose one of the following actions:

- **Approve** - Approve the contract and send it to the next step in the workflow.
- **Forward to...** - Send the contract to another approver for review. You will need to add a note before you forward the contract.
- **Return to Draft** - Returns the contract to draft status.

Approve a Contract from the Orders and Documents Approvals Page

1. Open a list of your approval items in Orders and Documents page using one of the following options:

- Navigate to **Orders and Documents > Approvals > My Approvals**.
- Click the **Action Items** icon in the top right corner next to your user name, then click **Contract Approvals** to open the Approvals screen.

2. (optional) In the left menu, select **Contract** in the **Type** field (under Filter My Approvals) to display a list of contracts that need approval.

3. (optional) To prevent another approver from approving the contract at the same time, select the checkbox next to the **item** you are approving and select **Assign to Myself** from the drop down menu in the top right corner of the table, then click **Go.**

> **Note:** You can approve a contract without assigning to yourself, but we recommend it, especially if it is in a shared approval folder or you will be spending a long time reviewing the contract.

4. Click the **contract number** to open a contract for review.

5. When you are finished your review, you have two choices. You can use the Contract Actions menu to approve the contract (see Approve a Contract from the contract actions menu) OR return to the Orders and Documents Approvals page.

6. In the Orders and Documents Approval page, select the checkbox to the right of the contract and choose one of the following actions:

- **Approve** - Click the **Approve** button next to the item OR Approve/Complete from the drop down menu above the table to send the contract to the next step in the workflow.

- **Return to Shared Folder** - If you have assigned the contract to yourself, select this option to return the contract to its shared folder where another approver can review it.

- **Put Request on Hold** - Select this option suspend workflow.

- **Forward To...** - Select to send the contract to another approver for review. You will need to add a note before you forward the contract.

7. Click **Go**.

Approve a Contract by Email

For systems with email approval enabled, a workflow step automatically sends an email to approvers when a contract is ready to be approved. The email contains a link that can be used to approve or return the contract through email without logging into the system. A PDF of the contract will be attached to the email unless it exceeds the attachment size limit. An agency may also use a setting to prevent the PDF from attaching to the approval email.

STEP-BY-STEP

You will need **Approve/Return Contracts** and **Approve/Return Contracts Via Email** permissions to perform this task. You must also have the notification preference **Contract Pending Workflow Approval** set to receive email.

1. You will receive an approval email.

2. In the email, clicking **Click here to approve the Contract** will open a contract summary containing details of the contract, with the actions that can be taken listed on along the bottom.

3. Choose one of the following options:

- **Approve** - Sends the contract to the next step in the workflow.

- **Assign to Myself** - Assigns the approval action to yourself to prevent another approver from approving the contract at the same time.

- **Return to Draft** - Returns the contract to draft status.

Once an action is clicked, you will receive a confirmation that the action has been completed.

Archive a Contract

You can archive contracts to keep your repository clean of contracts that are no longer in use. Contracts must be in Complete, Terminated or Superseded status. Internal edits are not allowed on archived contracts.

Archived contracts do not change status, but are hidden from general view. They cannot be accessed from simple searches, contract attachment search, or the contracts dashboard. The contract will not display on the Contracts tab of a vendor profile, the Contract Family page, or in contract reports.

Users with the **Manage Archived Contracts** permission will be able to search for archived contracts using an Advanced Search. The permission allows you to see the **Include Archive** filter on the Search Contracts - Advanced page. No is the default setting and excludes archived contracts from the search results. Selecting Yes in this search field includes archived contracts in the search results, where archived contracts are indicated by an archived icon ().
An archived contract displays a gray status bar with the message: "This contract is archived and can no longer be used." The Contract Actions field allows archived contracts to be "un-archived", which returns archived contracts to regular visibility in the system.

Archive

The contract to be archived must be in Complete, Terminated or Superseded status.

You need the **Manage Archived Contracts** permission, and have permission to edit the contract, to perform this task.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the contract you want to archive.

3. In the top right corner, select **Contract Actions**, then **Archive**.

The contract is archived and displays a gray status bar with the message: "This contract is archived and can no longer be used."

Search for Archived Contracts

You need the **Manage Archived Contracts** permission, and have permission to edit the contract, to perform this task.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts**.

2. Click Advanced Search.

3. In the **Include Archived** search filter, select **Yes**.

4. Click the **Search** button

Contracts that match the search criteria are listed. Archived contracts are indicated by an archived icon ().

Un-Archive a Contract

You need the **Manage Archived Contracts** permission, and have permission to edit the contract, to perform this task.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Open the contract you want to retrieve by searching for archived contracts using an Advanced Search.

3. In the top right corner, select **Contract Actions**, then **Un-Archive**. The contract returns to regular visibility in the system.

Assign a Contract Facilitator

Contract managers or administrators can temporarily assign a contract facilitator to a contract. This allows another contract manager or administrator to perform contract manager tasks for a short period of time prior to the contract reaching Executed: In Effect status.

If the contract facilitator option is enabled for your system, the following contract actions are available to contract managers and administrators:

- Assign Contract Facilitator
- Reassign Contract Facilitator
- Unassign Contract Facilitator

Only users with **Contract Manager** or **Contract Administrator** permissions can be assigned as contract facilitators. Only one contract facilitator can be assigned to a contract at a time.

If assigned to a contract, the contract facilitator will receive a notification as long as they have **Contract Facilitation Notification** enabled (Notification Preferences > Contracts > Contract Facilitation Notification).

Once assigned to a contract, the contract facilitator will receive a notification and they are automatically added to the Users and Contacts page of the contract. They acquire full access to all versions of the contract until it reaches *Executed: In Effect* status. When the contract reaches *Executed: In Effect Status*, the contract facilitator is automatically removed from the contract.

At any point, the contract manager, contract administrator or the contract facilitator can reassign the contract to another individual, or unassign the contract facilitator from the contract. When the contract reaches *Executed: In Effect Status*, the contract facilitator is automatically removed from the contract.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contract Administration > General Contract Settings**.

2. Search for and open the contract that you want to add a contract facilitator to.

3. In the top right corner of the contract page, click **Contract Actions** then **Assign Contract Facilitator**. The Assign Contract Facilitator window opens.

4. Click **Add Users**, then search for and select the person you want to be the contract facilitator. They must have contract manager or contract administrator permissions.

5. Click **Add User**.

6. (optional) Enter a comment regarding the contract facilitator if needed.

7. Click **Assign Contract Facilitator**.

The person is assigned as contract facilitator and has full access to all versions of the contract until it reaches Executed: In Effect status. The contract facilitator is listed in the Users and Contacts page of the contract.

Check Out and Check In

The Check In and Check Out options under Contract Actions allows you to check in or check out a contract to prevent other users from modifying it while you are making changes. A lock icon () indicates that a contract is checked out. Pause your mouse over the icon to see who the contract is checked out to. Checking out a record gives you exclusive use of it, and is required to perform most contract actions. Once changes are complete, checking in the contract makes it available to other users for editing. A record is automatically checked out to the person who created it and must be checked in before it can be changed by another user, reviewed, or approved.

Check Out a Contract

STEP-BY-STEP

This goal of this task is to check out a contract. This gives you exclusive use of the record and prevents other users from making changes to the record while you are working on it. In many cases you need to check out a contract before you can perform a contract action.

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the **contract** you want to check out. It must be in Draft status and not checked out to another user.

3. Under the **Contract Actions** field in the top right corner of the screen, click **Check Out**.

A statement indicating that the contract is checked out to you appears on the left, underneath the contract name.

Check In a Contract

STEP-BY-STEP

This goal of this task is to check in a contract. Checking in makes it available to other users for editing.

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the **contract** you want to check in. It must be in Draft status and checked out to you.

3. Under the **Contract Actions** field in the top right corner of the screen, click **Check In**. The contract is checked in and is available for editing by other users.

Contract Actions

Contract actions are tasks that can be performed on a contract. The Contract Actions button appears in the top right corner of contract screens. The options available in the drop down menu vary according to the status of the contract and your user permissions or role.

- **Amend** - Contract amendments are created when users need to update an approved contract, and the changes will affect the terms and conditions of the contract.

- **Approve** - Select to approve a contract.

- **Archive** - Allows you to archive contracts that are no longer in use. Contracts must be in Complete, Terminated or Superseded status. Archived contracts do not change status, but are hidden and cannot be seen in simple searches or the contracts dashboard, the Contracts tab of a vendor profile, the Contract Family page, or contract reports. You can search for archived contracts using an Advanced Search. Internal edits are not allowed on archived contracts. See *Un-Archive*.

- **Assign Contract Facilitator** - Allows a contract manager or contract administrator to give another contract manager or administrator temporary access to a contract prior to it reaching Executed: In Effect status. See *Reassign Contract Facilitator* and *Unassign Contract Facilitator*.

- **Assign to Myself** - Allows you to assign a contract approval task to yourself. This is used when a contract has been submitted for approval, and there are multiple users who could approve the contract. By assigning the task to yourself, you become owner of the approval task and it is removed from the shared approval folder. Select Return to Shared Folder to return the approval task to the shared folder.

- **Check In** and **Check Out** - Allows you to check in or check out a contract to prevent other users from modifying it while you are making changes. A lock icon () indicates that a contract is checked out. Pause your mouse over the icon to see who the contract is checked out to. Checking out a record gives you exclusive use of it, and is required to perform most contract actions. Once changes are complete, checking in the contract makes it available to other users for editing. A record is automatically checked out to the person who created it and must be checked in before it can be changed by another user, reviewed, or approved. See *Override Check Out*, below.

- **Check Out for Internal Edit** - Appears when a contract is in *Executed: In Effect* status and allows you to update information on approved contracts as long as the changes don't affect the terms and conditions of the contract. If the changes do affect the terms and conditions of a contract, you will need to create an amendment. You can edit the following pages during an internal edit:

- Header (limited fields only)
- Attachments (**Note:** Attachments are open for editing when performing an internal edit. This is to allow you to make **minor** changes to text that do not affect the terms and conditions of the contract. In the event of a discrepancy, the document of record is the signed version of the contract.)
- eProcurement Setup

- Budget and Spend
- Applies To
- Goods and Services
- PO Clauses
- Publish
- Users and Contacts
- Notifications
- Contract Family

- **Complete** - The contract has reached its scheduled end date and all steps required to close the contract have been done. The Complete action is typically used when a contract has reached its scheduled end date and has expired. Depending on your agency's configuration, this may be an automatic process that moves contracts to the Complete status when a contract's end date is reached, or it can be performed manually to indicate that you have finished invoicing against a contract and that it is inactive in the system. The Complete status can be reversed by selecting **Contract Actions > Return to Executed**.

- **Copy** - Allows you to copy an existing contract.

- **Create Invoice** - Allows you to create a non-PO invoice from a contract. This option is only available for agencies using eProcurement.

- **Delete** - Allows you to delete contracts that are in Draft status. You can only delete contracts when they are in Draft status.

- **Download Full Contract as PDF** - Click to download a PDF version of the contract that includes the main document and all attachments that have "Print with Full Contract" selected.

- **Forward To** - Allows you to forward a contract that is in the approval workflow to another user.

- **Launch eSignature** - Available for systems using eSignature. The contract manager selects this option to send the contract to be signed electronically. The individuals indicated as signatories in the eSignature screen will receive an email notification that allows them to open the document from their email and sign it electronically. When they have finished signing the document, the contract returns to the regular workflow. If using manual signature field placement, the contract manager needs to place signature field placeholders on the document before sending it out for signature.

- **Override Check Out** - Allows users with the permission to take control of a contract that has been checked out to another user. This is used in cases where the user who has the contract checked out is not available and an action needs to be performed on the contract.

- **Place on Hold** - Appears when a contract is in the approval workflow and assigned to you as an approver. Allows users with the appropriate permission to place a contract on hold.

- **Reassign Contract Facilitator** - Allows a contract manager, contract administrator or contract facilitator to remove the contract facilitator designation from one individual and reassign it to a different contract manager or contract administrator to perform contract manager-related tasks on a contract prior to it reaching Executed: In Effect status. See also *Assign Contract Facilitator* and *Unassign Contract Facilitator*.

- **Renew** - You can renew a contract that has reached its end date, as long as the contract allows renewals and there are renewals remaining.

- **Return to Draft** - Appears when a contract is in the approval workflow. Allows users with the appropriate permission to return the contract to Draft status to make updates.

- **Return to Executed** - Appears when a contract is in Complete status. Allows you to return the contract to **Executed: In Effect** status.

- **Return to Shared Folder** - Appears on contracts where you have assigned a contract approval task to yourself, but there are multiple users who could approve the contract. Selecting this option returns the task to the shared approval folder, where another user can pick up the approval task.

- **Terminate** - Allows you to end a contract prior to its scheduled end date. A termination is used post- suspension when terms cannot be reached and the contract will not go forward. This is a final step. You can copy and print a terminated contract, but it **cannot** be returned to active status.

- **Un-Archive** - Allows you to return archived contracts to visibility in simple searches, the contracts dashboard, the Contracts tab of a vendor profile, the Contract Family page, and contract reports. See *Archive*.

- **Unassign Contract Facilitator** - Allows a contract manager, contract administrator or contract facilitator to remove the contract facilitator designation from an individual. See also Assign Contract Facilitator and Reassign Contract Facilitator.

- **Upload Fully Executed Contract** - Appears when a contract is in Out for Signature status. It indicates that the contract has been approved, but a signed copy of the contract has not been uploaded into the system. Click to upload a signed copy of the contract.

- **Version History** - Selecting Version History in any record will open up a screen that contains a log of all actions performed on the record.

You can view a history of changes made to a contract by clicking the **History** link in the top right corner of the screen.

Contract Amendments

Contract amendments are created when you need to update an approved (Executed) contract, and the changes will affect the terms and conditions of the contract.

When a contract is amended, all data from the original contract is copied into the amendment, including contract custom fields. The **Contract Number** and **Contract Type** are locked and cannot be changed, but all other fields can be updated on the amendment.

Amendments in progress can be deleted and the contract will return to the last saved version of the approved contract.

Once changes to the contract are complete, the amendment can be submitted for approval.

STEP-BY-STEP

1. The goal of this task is to amend an existing contract. You must be the Contract Manager on the contract, or Contract Administrator of the project associated with the contract in order to amend a contract. The contract must be approved and active.

2. Open the contract that you would like to amend by searching for the contract and opening it from the search results or from the **Contracts Dashboard** (if you have access).

3. In the top-right corner of the contract page, select the **Contract Actions** drop-down menu.

4. Select **Amend**.

5. In the window asking if you are sure you want to amend this contract, click **Yes**. The contract header of the amendment opens, containing information copied from the last version of the contract you are amending. The Contract Number and Contract Type fields are locked and cannot be changed.

> **Note:** Notice that the color of the bar at the top of the page has changed color and the Actions button is now "Amendment Actions".

6. Make changes to the editable contract header fields as needed.

7. Click **Next**.

8. Make changes to additional contract screens as needed.

9. Once your changes are complete and correct, you can **Submit for Approval**, which will release the contract into the workflow.

Copy a Contract

You can copy an existing contract to create a new contract. This is useful when you need to create a contract with details that are similar to an existing contract.

Important Note: Double-check your updates to the copied contract before saving. Some fields, including Contract Number and Vendor Name, cannot be changed after a contract is fully executed.

Systems using the repository or authoring feature have the option to copy the latest versions of attachments from the source contract into the new contract.

When a contract is copied a new contract is created in Draft mode with contract number, name and type as entered in the Copy Contract window, and all other information copied from the original contract:

- The start and end dates will carry over from the source contract, but you can change the dates on the new contract.
- The contract manager and stakeholders will carry over from the source contract.
- The "Active for Shopping" value or setting will carry over to the copied contract (as soon as the contract become effective).
- The contract facilitator is not copied to the new contract.
- Obligations are not copied to the new contract.

You must be a **Contract Manager** or **Contract Administrator** for the original contract to copy it.

STEP-BY-STEP

1. Open the contract you want to copy by navigating to **Catalogs and Contracts > Contracts** and selecting **Search Contracts** (or **Contracts Dashboard** if you have access).
2. In the top-right corner of the contract page, click **Contract Actions**, then **Copy**. The Copy Contract window opens with a new contract number, and "Copy of [original contract number]" as the contract name.
3. Modify the **contract number**, **contract name** and **contract type** as needed. Field names with a star ( ) are★ required.
4. To include the latest version of all attachments from the original contract, click **Yes** next to "Include the latest attachments versions?" The default setting is No.
5. Click the **Copy** button.

A new contract is created in Draft mode.

Delete a Contract in Draft Status

You can only delete a contract that is in Draft status. There is no way to restore a contract once it is deleted.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the **contract** you want to delete. It must be in Draft status.

3. Under the **Contract Actions** field in the top right corner of the screen, click **Delete Contract**.

4. Click **Yes** in the confirmation window. **Note:** There is no way to restore a contract once it is deleted. The contract is deleted.

Extending a Contract End Date

Users with the appropriate permission can extend the end dates of contracts in *Executed: In Effect*, *Executed: Future*, or *Expired* status. This way, contracts can remain in effect while a renewal, amendment or a new contract is being created.

WHEN CAN A CONTRACT BE EXTENDED?

- The ability to extend a contract assumes that the original contract has language that allows the end date to be extended at any time.
- This option is only available for contracts, amendments and renewals in *Executed: In Effect*, *Executed: Future*, or *Expired* status.
- You need the **Extend Contract End Date** (Permissions Settings > Contracts > Extend Contract End Date) permission to extend contract end dates. No new or special permission is required to create an amendment to an expired contract.

HOW LONG CAN A CONTRACT BE EXTENDED FOR?

- There is no limit to how long a contract may extended, but the extended end date must be beyond the original end date.
- You cannot change a contract with an end date to one that does not have an end date (i.e., an evergreen contract), nor extend the end date on a contract that has been superseded.

WHAT HAPPENS WHEN A CONTRACT IS EXTENDED?

- Extended contracts do not go through workflow for approval.
- If an expired contract has been extended, its contract status will be moved from *Expired* to *Executed: In Effect*. The status of contracts that were already in *Executed: In Effect* or *Executed: Future* status will not change.
- A note next to the contract status at the top of the contract page indicates that a contract has been extended.

EXTENDING CONTRACTS THAT HAVE RENEWALS REMAINING BUT NOT CREATED

When extending contracts that have renewals remaining but not yet created, the next renewal will not be auto-created until the extended end date is reached. Once the renewal reaches *Executed: In Effect* status it will supersede the extended contract.

EXTENDING CONTRACTS THAT HAVE RENEWALS OR AMENDMENTS IN PROGRESS

When extending contracts that have renewals or amendments in progress but they have not reached *Executed: In Effect* status, a **warning** appears in the following situations to identify potential gaps or overlaps between extended contracts and their renewals or amendments:

- **If the extended end date is later than the start date of the renewal or amendment**. This identifies an overlap, where the renewal or amendment in progress is scheduled to begin before the extended contract ends.

- **If the extended end date is earlier than the start date of the renewal or amendment**. This identifies a gap between the end date of the extended contract and the start date of the renewal or amendment contract.

ERRORS

An **error** appears in the following situations and you cannot extend the contract:

- **If the extended end date is later than the end date of a renewal or amendment**. This identifies situations where the original contract would be in effect longer than the renewal or amendment and the dates must be revised.

- **If the extended end date is prior to the original end date.** This identifies situations where the extended contract would be shorter than the original contract and the dates must be revised.

- If the contract has a status of Expired and a vendor selected as a primary or additional second party on the contract has been deleted from the system.

SEARCHING FOR EXTENDED CONTRACTS

The **Contract Term Extended** field on Advanced Search allows you to search for extended contracts. Select **Yes** to include extended contracts in the search results (including amendments and renewals). Select **No** if extended contracts should not be included in the search results (default setting).

The **Extension Count** field in the contract search results indicates the number of times a contract has been extended.

EXTENDING END DATES THROUGH CSV OR XML IMPORT/EXPORT

Contracts can be extended through CSV or XML Import/Export as long as you have the **Extend Contract End Date** permission and access to the contract. You can change the contract end date to a date in the past when importing contracts, though the system will issue a warning.

Extend a Contract End Date

The contract must be in *Executed: In Effect*, *Executed: Future* or *Expired* status.

The ability to extend a contract assumes that the original contract has language that allows the end date to be extended at any time.

The **Extend Contract End Date** (Permission Settings > Contracts > Extend Contract End Date) permission is required to perform this task.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts**.

2. Search for and select the **contract** you want to extend. It must be in *Executed: In Effect*, *Executed: Future*, or *Expired* status. Check out the contract if it is not checked out to you.

3. Click the **Extend Expiration Date** field. It is located on the contract header, in the Dates and Renewal section, under the End Date field.

4. Enter the **new end date** and click **Extend Expiration Date**.

The contract end date changes to the new end date. A "Contract has been extended." note appears next to the contract status at the top of the page.

Renew a Contract

You can renew a contract as long as the contract allows renewals and there are renewals remaining (indicated on the Renewals Remaining field on the contract header) and if that contract is in an Executed: In Effect status. If you have set the contract to auto-renew, this process occurs automatically.

When Renew is selected from the Contract Actions menu, a new contract record is generated with the same contract number. The start and end dates on the renewed contract are pushed forward from the dates on the original contract, for the length of time indicated by the Renewal Term.

The renewed contract will be sent through the approval workflow, but can be canceled at any time prior to the final approval.

STEP-BY-STEP

You must be the **Contract Manager** on the contract, or **Contract Administrator** of the project associated with the contract in order to renew a contract. The contract must be approved and active.

1. Open the contract that you would like to renew. You can open the contract by searching for the contract and opening it from the search results or by accessing it from **Contract's Dashboard** (if you have access).

2. In the top-right corner of the contract page, select the **Contract Actions** drop-down menu.

3. Select **Renew**. In the window asking if you are sure you want to renew this contract, click **Yes**. The contract header of the renewal contract opens, containing information copied from the last version of the contract you are renewing.

Note: Notice that the color of the bar at the top of the page has changed color and the Actions button is now "Renewal Actions".

4. Make changes to the contract header fields as needed.

5. Click **Next**.

6. Make changes to additional contract screens as needed.

7. Once your changes are complete and correct, you can **Submit for Approval**, which will release the contract into the approval workflow.

Terminate a Contract

This goal of this task is to terminate an approved contract. The contract must be approved and active. **Note:** This is a final step. You can copy and print a terminated contract, but terminating a contract is **irreversible** and it cannot be returned to active status.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the fully executed contract you want to terminate.

3. In the top right corner, select **Contract Actions** > **Terminate**.

4. Enter a **note** regarding the terminated contract.

5. Click **Yes** in the confirmation window. The contract is terminated, as of today's date.

Update a Contract (Check Out for Internal Edit)

The Check Out for Internal Edit option appears when a contract is in *Executed: In Effect* status and allows you to update information on approved contracts as long as the changes don't affect the terms and conditions of the contract. If the changes do affect the terms and conditions of a contract, you will need to create an amendment.

You can edit the following pages during an internal edit:

- Header (limited fields only)
- Attachments (**Note:** Attachments are open for editing when performing an internal edit. This is to allow you to make **minor** changes to text that do not affect the terms and conditions of the contract. In the event of a discrepancy, the document of record is the signed version of the contract.)
- eProcurement Setup
- Budget and Spend
- Applies To
- Goods and Services
- PO Clauses
- Publish
- Users and Contacts
- Notifications
- Contract Family

The contract must be approved and in *Executed: In Effect* status.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).
2. Search for and open the fully executed contract you want to change.
3. In the top right corner, select **Contract Actions > Check Out for Internal Edit**, then click **Yes** in the confirmation window. The contract is checked out to you.
4. Make changes to editable fields and pages as needed.
5. Once changes are complete, click **Contract Actions**, then **Check In**. Changes are saved.

View Contract Workflow Steps

There may be times when you have questions about a contract's behavior as it moves through workflow. A contract may stop in a particular step and you need to know why. Or, conversely, a contract may move through that same step without stopping. The workflow inspector tool allows you to view the data that caused the behavior of document in a workflow step.

Workflow steps can be viewed by opening the contract and looking at the Approvals page (accessed from the left menu). The workflow inspector displays the details of the step and indicates whether or not the values needed to complete the step are present in the contract.

View Workflow Steps on a Contract

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts**.
2. Select the **contract** you want to view workflow steps for.

3. In the left menu, select **Submit for Approval** (for contracts in Draft mode), or **Approvals** (for contracts in Executed: In Effect status).

4. Expand the **View Approval Steps** section. The workflow approval steps set for the contract are displayed.

5. Select the **Show skipped steps** checkbox to display all steps in the workflow, including ones that may have been skipped because the contract did not apply to, or met, the criteria. In the **Orientation** field you can specify how you want to view the workflow steps.

View Details of a Contract Workflow Step

STEP-BY-STEP

Those with appropriate permissions can also view the list of approvers for a specific step.

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts**.

2. Select the **contract** you want to view workflow steps for.

3. In the left menu, select **Submit for Approval** (for contracts in Draft mode), or **Approvals** (for contracts in Executed: In Effect status).

4. Expand the **View Approval Steps** section. The workflow approval steps set for the contract are displayed.

5. Choose one of the following for the step you need information about:

- Click the **title** of the step to view details of the step.
- Click **view approvers** to see a list of who can approve the workflow step.

REPORTS

Contracts that Require Attention: Expiring Contracts Report

Use the **Contracts that Require Attention: Expiring Contracts** report to identify contracts that have expired or are about to expire. Contract managers can use the data to identify which contracts need immediate attention and take the appropriate action. The report indicates:

- Contracts that have expired or are about to expire, with and without renewals remaining, and no renewal or amendment created.
- Contracts that have expired or are about to expire, with and without renewals remaining, and a renewal or amendment has been created but not executed.
- Contracts with zero renewals remaining.
- Contracts that will auto-renew.

> **Note:** When a contract has a renewal that will auto-create in the future, it is counted as a renewal in progress. The renewal will show on the report as "Will auto create on [__/__] date."

Filters on the report can be used to sort by:

- Contracts ending within a specified period of time
- Renewal or amendment status. The Renewal Status filter includes a status for contracts that are set up to automatically create a renewal at a future date
- Renewals remaining
- Contract type
- Contract manager

VIEWING OPTIONS

The **Contracts that Require Attention: Expiring Contracts** report can be viewed as a bar graph, list, or calendar:

- The **Graphs** section displays the **By Expiration** bar graph, which shows the number of contracts that are expired or are about to expire in one week, one month, or more than one month. The **Renewal and Amendments** bar graph shows the number of contracts that have no renewal or amendment remaining, and the number of contracts with a renewal or amendment in progress.

- The **Details** section displays a list of search results. Toggle between **list** and **calendar** views by clicking the list icon or calendar icon at the top of the results table:

In the **list** view:

- Click the **settings** icon to select the columns you want displayed in the results table. All columns are displayed initially, but you can clear checkboxes to hide columns and the settings are saved for the next time you access the report. Green checks indicate required columns and cannot be modified.

- Click on a **contract number** to view the contract summary. If you have access to the contract click **Go to Contract** on the contract summary page to open the contract.

In the **calendar** view:

- Contracts that are about to expire are displayed in a calendar on their scheduled end date.

- Clicking on an item in the calendar opens a pop up window that shows the contract name, contract end date, contract managers and primary second party. It also provides a link to the contract for those with the appropriate permissions.

- The calendar opens to the current month by default. Icons on the top left and right corners of the calendar are used to navigate other dates and switch between month and day views.

- Click the download file link in the top right corner of the page to export calendar events to Outlook, Google Calendar or Mac Calendar.

Generate an Expiring Contract Report

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Reports > Contracts That Require Attention: Expiring Contracts**.

2. Select the time period for the report by selecting one of the following options in the **Contracts Ending Within** field:

- **0-30 Days** - Returns contracts with an end date within 30 days of today's date.
- **31-60 Days** - Returns contracts with an end date 31-60 days from today's date.
- **61-90 Days** - Returns contracts with an end date 61-90 days from today's date.
- **91-120 Days** - Returns contracts with an end date 91-120 days from today's date.
- **Next X Days** - Selecting this option opens a field where you can select the number of days from today's date that you want to return results for.
- **Date Range** - Returns results within a period of time. Selecting this option opens From and To fields, where you can select the first and last date of the range.
- **Remaining Fiscal Year** - Returns contracts with end dates from the current date through the rest of the fiscal year, as set for your agency.

3. In the **Renewal/Amendment Status** field, select one of the following options. Leave the field blank to allow all records for the field to be returned:

- **No Renewal/Amendment Created** - Returns expired or expiring contracts with no renewals or amendments created.
- **Renewal is In Progress** - Returns expired or expiring contracts where there is a renewal created but it has not reached *Executed: In Effect* status.
- **Amendment is In Progress** - Returns expired or expiring contracts where there is an amendment created but it has not reached *Executed: In Effect* Status.

4. In the **Renewals Remaining** field, select one of the following options. Leave the field blank to allow all records for the field to be returned:

- **None** - Returns expired or expiring contracts with no renewals remaining (0 in the Renewals Remaining field on the contract header).
- **One or more** - Returns expired or expiring contracts with at least one renewal remaining.

5. Select the **Only My Contracts** checkbox to view only contracts where you are a contract manager (default setting). Clear the checkbox if you want to view information for all the contracts you have access to.

6. (optional) Click **More Options** for additional filter settings. Click the Search icon next to a field to select search criteria. Leave a filter field blank to allow all records for the field to be returned:

- **Contract Manager** - Returns contracts that have the selected contract managers.
- **Contract Type** - Returns contracts that use the selected contract types.
- **Renewal Status** - Returns contracts with renewals in the selected statuses.

Important Note: The **Will Auto-Create in the Future** status is unique to this field. Select it to generate a list of contracts that are set up to automatically create a renewal at a future date

- **Amendment Status** - Returns contracts with amendments in the selected statuses.

7. Click **Run Report**. Contracts that meet search criteria are listed in the Graphs and Details sections.

8. (optional) Click **Save Filters** to save your filter settings for future use. **Note:** This feature is similar to saved searches. See Saved Searches for more information.

Export an Expired Report as an Excel file

STEP-BY-STEP

The goal of this task is to save the results from an Expired Report in an Excel file.

1. Navigate to **Catalogs and Contracts Contracts.> Reports > Contracts That Require Attention: Expiring**

2. Select search filters and run the report.

3. Click the **Export** button in the top right corner of the screen. The Export Request window opens.

4. Enter notes describing the report in the **Description** field and click **Submit**. The Export Request Submitted window opens.

5. Click **Go to Page: Download Export Files**. The Contract Import/Export Results screen opens.

6. If needed, click **Refresh File** next to the downloaded file name to update the status of the download.

7. Once the export shows a status of **Completed**, click the **file name** to download the report. The downloaded file appears as an icon in the lower left corner of the screen.

8. Click on the **file icon** to open and save the Excel file.

Contracts that Require Attention: Review Pending Report

Use the Contracts that Require Attention: Review Pending report to identify contracts that have a review approaching.

Results are listed in a table and can be exported as an Excel file. If you have access to the contract, click on a **contract number** to open the contract. Click on an information icon to view the contract summary page.

Generate a Contracts that Require Attention: Review Pending Report

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Reports > Contracts that Require Attention: Review Pending**.

2. Select the time period for the report by selecting one of the following options in the Occurs Within field:

- **0-30 Days** - Returns contracts with reviews occurring within 30 days of today's date.
- **31-60 Days** - Returns contracts with reviews occurring 31-60 days from today's date.
- **61-90 Days** - Returns contracts with reviews occurring 61-90 days from today's date.
- **91-120 Days** - Returns contracts with reviews occurring 91-120 days from today's date.
- **Next X Days** - Selecting this option opens a field where you can select the number of days from today's date that you want to return results for.
- **Date Range** - Returns results within a period of time. Selecting this option opens From: and To: fields, where you can select the first and last date of the range.

- **Remaining Fiscal Year** - Returns contracts with a review occurring from the current date through the rest of the fiscal year, as set for your agency.

3. Click **Run Report**.

Contracts that have reviews pending within the time period selected will be listed in the results table.

Export a Contracts that Require Attention: Review Pending Report as an Excel File

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts Pending.> Reports > Contracts that Require Attention: Review**

2. Select search filters and run the report.

3. Click the **Export** button in the top right corner of the screen.

4. Enter a notes describing the report in the **Description** field and click **Submit**. The Export Request Submitted window opens.

5. Click **Go to Page: Download Export Files**. The Contract Import/Export Results screen opens.

6. If needed, click **Refresh File** next to the downloaded file name to update the status of the download.

7. Once the export shows a status of Completed, click the **file name** to download the report. The downloaded file appears as an icon in the lower left corner of the screen.

8. Click on the **file icon** to open and save the Excel file.

Cycle Time Report

The Cycle Time Report shows how long it takes contracts to move from contract creation to contract execution. It only shows information for contracts that are in Executed status. There are four sections on the report:

- The **Time Distribution** bar chart shows the number of days it took all contracts that meet the filter criteria to move from contract creation to contract execution. The contracts are grouped by time blocks, for example, contracts that were executed within 1-7 days, 8-14 days, etc. You can drill down into the data by clicking on a bar on the graph to display a list of contracts that fall into that time period.

- The **Average Status Percentage** pie chart shows each status and the average amount of time (in percent) that contracts spent in each status. This is the average of all contracts that meet the filter criteria.

- A **Details** table shows the length of time individual contracts spent in each status, and the total time it took to become executed. You can drill down into the data: click on a contract number to open the contract header, click on the info icon next to a contract number to view a contract summary. Click on the info icon next to a status to open a time line for a single contract. This shows individual status transitions and the percent of time the selected contract spent in each status. It also displays individuals who reviewed the contract and how long they spent reviewing the contract.

- The **Summary** table shows the Time Distribution bar chart information in a table format. Results can be exported as an Excel file, or as a saved search to reuse later.

REPORT FILTERS

The following filters can be applied to the report. If the field is not required, leave the search filters blank to return results for all field values:

- **Contracts** - Choose **Created** to return results for contracts that have been both created and executed within the time period selected. Select **Executed** to return results for contracts that have been executed within the time period, but could have been created at any time.
- **Time Period** - Filter within a date range or by fiscal time period as set for your agency.
- **Contract Type** - Select one or more contract types for the report.
- **Project** - Select one or more projects for the report.
- **Contract Manager** - Select one or more contract managers for the report.
- **Contract Version Type** - Filter by original contracts, renewals or amendments.
- **Time Distribution Group** - Select the time blocks that are displayed on the Time Distribution bar chart.

Generate a Cycle Time Report

The goal of this task is to generate a Cycle Time Report.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Reports > Cycle Time Report: Contract Creation to Execution**.
2. In the Contracts field, select **Created** to return results for contracts that have been both created and executed within the time period selected. Select **Executed** to return results for contracts that have been executed within the time period, but could have been created at any time.
3. In the **Within** field, select the **time period** to report on by selecting a **date range** (from today's date), or a fiscal time period.
4. (optional) Click **More Options** to filter by these fields. Leave the search filters blank to return results for all field values.

- **Contract Type** - Select the contract types you want to report on.
- **Project** - Select the projects you want to report on.
- **Contract Manager** - Select the contract managers you want to report on.
- **Contract Version Type** - Select whether you want to report on the original, renewal, or amendment versions of the contract.

5. Once the search filters are set, click **Search**. Results are displayed in graphs that show the number of contracts created or executed across the time period selected, and the average amount of time that contracts spend in each status. Detailed results are listed in tables.
6. (optional) On the Time Distribution chart, click on a bar graph to display a list of the contracts that fall into that time period.
7. (optional) In the Details table, click on a **contract number** link to go to the contract header of a contract. Click on the info icon next to the contract number to open the contract summary page. Click on the Info icon next to a **status** to show a time line for a single contract. This includes individual status transitions and the percent of time the selected contract spent in each status. It also displays individuals who reviewed the contract and how long they spent reviewing the contract. Click on a **contract manager** link to show the contract manager contact information.

Export a Cycle Time Report as an Excel file

The goal of this task is to export the Cycle Time Report: Contract Creation to Execution results as an Excel file.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Reports > Cycle Time Report: Contract Creation to Execution**.
2. Select search filters and run the report.
3. Click the **Export** button in the top right corner of the screen. The Export Submitted window opens.
4. Enter **notes** describing the report in the Description field and click **Submit**.
5. Click **Go to Page: Download Export Files**. The Contract Import/Export screen opens, showing download information and the status of the export.
6. If needed, click **Refresh File** next to the file name to update the status of the download.
7. Once the downloaded file has a status of **Completed**, click on the **file name** of the downloaded report. The downloaded file appears as an icon in the lower left corner of the screen.
8. Click on the **file icon** to open and save the Excel file.

Obligations Across Contracts Report

The **Obligations Across Contracts** report provides a list of all one time and recurring obligations connected to you. This includes obligations where you are an obligation owner or stakeholder, and also obligations on the contracts that you have access to.

What you can see and do from the report will depend on your permissions:

- **Contract Managers** - Can view obligations and mark them as complete. Contract managers can open a contract by clicking on a **contract number** in the results to open the contract summary, then **Go to Contract** to open the contract.
- **Obligation Owners** - Can view obligations and mark them as complete. Obligation owners who do not have access to the contract can complete obligations from the report. Links in email notifications will take them to the Obligations Across Contracts Report, where they will only see the obligation for which they were notified.
- **Obligation Stakeholders (internal)** - Can view obligations only.

By default, the report shows upcoming and overdue obligations that occur 365 days from the earliest obligation due date. Search filters allow you to narrow search results by:

- Obligation Status
- Obligations within a date range
- Contract Type
- Project
- Tags
- Contract Manager
- First Party Owners

One time and recurring obligations are listed in a table. Each occurrence of a recurring obligation is listed as a single record and identified by a recurring icon underneath the obligation due date. Click the **Mark as Complete** menu next to an item to view obligation properties or mark an obligation as complete.

Click the **settings** icon to select the columns you want displayed in the results table. All columns are displayed initially, but you can clear checkboxes to hide columns and the settings are saved for the next time you run the report. Green checks indicate required columns and cannot be modified. Click the arrows next to a column header to sort records by that column in ascending or descending order.

Generate an Obligations Across Contracts Report

STEP-BY-STEP

Leaving a field blank allows all records for the field to be returned:

1. Navigate to **Catalogs and Contracts > Reports > Obligations Across Contracts**.
2. Select the **time period** for the report by selecting a **start** and **end date** in the **Due Date From** and **Due Date To** fields. **Note:** If these fields are left blank the system displays obligations from the earliest due date until 365 days from that date.
3. (optional) Select one or more **obligation statuses** to return obligations that are in the selected statuses. Overdue and Upcoming statuses are selected by default.
4. (optional) Select one or more **tags** to return obligations that contain the selected tags.
5. (optional) Click **More Options** to show additional search filter fields.

- **Contract Type** - Returns obligations on contracts where the contract belongs to one of the selected contract types.
- **Project** - Returns obligations on contracts where the contract belongs to one of the selected projects.
- **Contract Manager** - Returns obligations on contracts where the selected individuals are named as contract managers on the contract.
- **First Party Owner** - Returns obligations on contracts where the selected individuals are named as first party owner on the obligation.

6. Click **Run Report**. The results are displayed in a table.
7. (optional) Expand the **Mark as Complete** menu for an obligation to view its properties or mark it as complete. Click on a **contract number** in the results to open the contract summary. If you have the appropriate permission you can click **Go to Contract** on the contract summary page to open the contract.

Complete an Obligation from the Obligations Across Contracts Report

Use this option if you are an obligation owner and do not have access to the contract.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Reports > Obligations Across Contracts**.
2. Set the search filters and click **Run Report**. The report searches for overdue and upcoming obligations by default.
3. Expand the **Mark as Complete** menu for the obligation you want to complete, then select **Mark as Complete**. The Mark as Complete window opens.
4. Complete the following fields:

- **Completed Date** - Enter the **date** and **time** the obligation was completed. The current date and time are displayed by default.

- (optional) **Notes** - Enter **notes** about completing the obligation.
- **Attachments** - Add any **attachments** required by the obligation. Click **Select files...** to locate and add the file from your system, or drag and drop a file into the gray square surrounding the **Select files....** field.

> **Note:** Attachments are required if the **Documents Is Required** checkbox is selected when the obligation is created and you will not be able to complete the obligation until a file is uploaded here.

5. Click **Mark as Complete**.

The obligation status moves to Complete and a notification will be sent to the appropriate owners and stakeholders.

Workload Report by Contract Manager

The Workload Report by Contract Manager under Catalogs and Contracts allows users to select a contract manager and see what stage their contracts are in (authored, approved, amended, renewed, etc.).

You can filter the report by contract manager and/or contract status. The statuses that can be selected as filters are all the statuses that a contract can be in within TCM.

Clicking on a result higher than 0 opens the Workload Detail Report, which shows all contracts for the contract manager and in the contract status selected. From there, you can open a contract by clicking on the contract number.

Generate a Workload Report by Contract Manager

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Reports > Workload Report by Contract Manager**.

2. In the **Contract Manager** field, select the **contract managers** that you want to report on. Leaving the field blank will return results for all contract managers.

3. In the **Contract Status** field, select the **contract statuses** that you want to report on. Leaving the field blank will return results for all contract statuses.

4. Click **Run Report**. The results appear in a table.

5. (optional) Click on a **number highlighted in blue** to open the Workload Detail report, which shows a list of all contracts for the contract manager and in the contract status selected.

6. (optional) Click on a **contract number** to open a specific contract.

Export a Workload Report by Contract Manager as an Excel file

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Reports > Workload Report by Contract Manager**.

2. Select search filters and run the report.

3. Click the **Export** button in the top right corner of the screen. The Export Submitted window opens.

4. In the Description field, enter **notes** describing the report.

5. (optional) Click **Single Worksheet for each Contract Manager** if you want the Excel file to display the results for each contract manager on a separate tab.

6. Click **Submit**.

7. Click **Go to Page: Download Export Files**. The Contract Import/Export screen opens, showing download information and the status of the export.

8. If needed, click **Refresh File** next to the file name to update the status of the download.

9. Once the downloaded file has a status of **Completed**, click on the **file name** of the downloaded report. The generated file appears as an icon in the lower left corner of the screen.

10. Click on the **file icon** to open and save the Excel file.

SOURCING DIRECTOR CONTRACTS

If your system is integrated with Sourcing Director, you can create contracts from a Sourcing Director event. Once the contract creation process is initiated in Sourcing Director, a contract will be automatically created. Contracts include event attachments submitted by the buyer and vendor from Sourcing Director (in the file format), and line items that are part of the event negotiation.

In Sourcing Director, contract creation can be initiated before an event is awarded. The event must be in *Under Evaluation* status. You can create a contract that contains all items from an event, multiple contracts for an event (each contract containing one or more items), or contracts with no items.

As items are added to a contract, they are removed from selection, so that an item from an event can only be included once on a contract.

MANAGE LINE ITEMS ON A SOURCING EVENT CONTRACT

Items populated from the sourcing event appear in the Product Items and Service Items screens on the contract header. You can add items that are not from the sourcing event to the contract as well as add, edit and delete contract items and shopping items from the contract. A "Copy to Shopping" option allows items added from the sourcing event to be copied into the Goods and Services area as non-catalog items, to make them available for shopping.

CREATE SOURCING EVENTS FROM RENEWING OR EXPIRING SOURCING EVENT CONTRACTS

A notification will inform event managers that a contract created from a sourcing event is up for renewal or about to expire. The notification provides an option to re-create the sourcing event by copying the original sourcing event to a new sourcing event.

Create a Contract from a Sourcing Event

The goal of this task is to create a contract from a Sourcing Director Event.

You must have the **Initiate Contract Process** permission to perform this task (Permission Settings > Sourcing > Events > Initiate Contract Process). You also need the appropriate Contracts permissions, and to be added as users on the Contract Users tab of the appropriate Sourcing Director project.

Note: These instructions start with an existing sourcing event that is in *Under Evaluation* status.

STEP-BY-STEP

1. Log into **Sourcing Director**.
2. In the left menu, navigate to **Sourcing > Sourcing Events Dashboard**. The Sourcing Events dashboard opens.
3. Click **Under Evaluation** to display events in that status.
4. Select the **event** you want to create a contract for. The event must be in *Under Evaluation* status.
5. Under the Vendor Responses heading, click the **Load Saved Scenario** button. The Load Saved Scenario window opens.
6. Click the **Load** button to the right of the scenario you want to create a contract for. The scenario opens.
7. Click the **Scenario Breakdown** tab.

8. Click the **Finalize Award** button. The *Create Contract* link appears. **Note:** The Create Contract link is only available after you click Finalize Award and if you have the appropriate permissions. If you click the Remove Finalize Award button, the link will disappear.

9. Click the **Create Contract** link next to the Vendor Total field on the right side of the screen. The Create Contract wizard opens.

10. Complete the following fields for the contract header:

- **Contract Name** – The name of the sourcing event automatically populates the field by default. Change the name of the contract if needed.

- **Contract Type** – Select a contract type and click **Save Changes**.

- **Access and Visibility** – Select **Normal** to define access to the contract from project settings and user permissions. Select **Confidential** to select each user who can access the contract.

11. Click **Next**.

12. Select a **project** for the contract and click **Next**.

13. Select a **template** or upload a document that will be used as the main contract document and click **Next**.

14. Complete the **contract number** and **start** and **end date** fields, and click **Next**.

15. Under *Items to Include In Contract*, select one of the following options:

- **All Items to be Awarded to this Vendor** – Select to create one contract that contains all items from the event.

- **Let Me Pick** – Select to create multiple contracts for the event, each contract containing one or more items that you choose. As items are added to a contract, they are removed from selection, so that an item from an event can only be included once on a contract.

- **None** – You may choose to create a contract with no items.

16. If you have chosen *Let Me Pick* in step 15, select the checkbox next to **each item** you want to add to the contract.

17. Click **Create Contract**. The status appears under the Contract Number and Status column next to the items that have been added to a contract. The status will change as the contract moves from status to status.

18. (optional) If you have chosen *Let Me Pick* in step 15, repeat steps 9 to 17 to create more contracts for the event.

You can click on the contract number to open the contract and modify additional settings as needed.

Manage Line Items on a Sourced Contract

Customers that have Sourcing Director with Total Contract Manager and eProcurement can source goods and services and make them "shop-able" for requesters. The Product Items and Service Items pages on the contract header provide the following options for managing contract items on contracts created from a sourcing event.

- A "Copy to Shopping Items" option allows items added from the sourcing event to be copied into the Goods and Services area as non-catalog items, to make them available for shopping.
- Indicators show which items have been added from a sourcing event and copied to shopping items.
- You can add items that are not from the sourcing event to the contract.
- You can add, edit and delete contract items and shopping items.

Copy to Shopping

These instructions start with a sourcing event contract with line items from the sourcing event. The contract must use a contract type that can be used for eProcurement.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the appropriate **contract.**

3. In the left menu, select **Product Items** or **Service Items** under the Header menu.

4. Select **Actions > Copy to Shopping Items** next to a line item that has not been copied to shopping (there is no checkmark in the Copied to Shopping Items column). The Contract Non-Catalog window opens.

5. Add details about the product in each of the fields. These contract items should be as detailed as possible.

> **Note:** An override field on the Contract Non-Catalog Item page allows you to override the commodity code for product or service item that was assigned in the sourcing event, and assign a different category and commodity code to the item that will be used on all purchases and integrations going forward. The overridden value is not validated against commodity codes entered by an agency or affect any category-based product views.

6. Click **Save.**

7. The item is copied to shopping and appears in Goods and Services on the Non-Catalog Items tab.

> **Note:** Copy to shopping is truly a copy of the item to the Non Catalog Items page. Any changes made to the item via Goods and Services > Manage Non Catalog Items will not be reflected back on the contract product/services items.

Add a Line Item to a Sourced Contract

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the appropriate **contract.** Check out the contract if it is not checked out to you.

3. In the left menu, select **Product Items** or **Service Items** under the Header menu.

4. Click the **Add New Item** button.

5. Add details about the product in each of the fields. These contract items should be as detailed as possible.

> **Note:** An override field on the Contract Non-Catalog Item page allows you to override the commodity code for product or service item that was assigned in the sourcing event, and assign a different category and commodity code to the item that will be used on all purchases and integrations going forward. The overridden value is not validated against commodity codes entered by an agency or affect any category-based product views.

6. Click **Save Changes**.

Remove a Line Item from a Sourced Contract

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the appropriate **contract**. Check out the contract if it is not checked out to you.

3. In the left menu, select **Product Items** or **Service Items** under the Header menu.

4. Click **Actions > Remove Contract Item** next to the item you want to delete.

5. If the line item has been copied to shopping, select **Remove from the Contract and Shopping** to remove the item from the contract and the non-catalog item page, or **Remove from the Contract Only** to remove it from the contract, but leave it available for shopping as a non-catalog item.

6. Click **Remove**.

Create a Sourcing Event from Renewing or Expiring Contracts

When a sourced contract is about to be renewed or expire, the event owner may want to re-source the event.

An advance notification setting on a sourced contract (a contract that was created from a sourcing event) can be set to inform the event owner in advance that a sourced contract is about to renew or expire. When that date occurs, a system email, notification and action item is sent to the event owner.

From the email, notification or the action item, the event owner can navigate to a page called **Sourced Contract Advance Notices**. This page will show all the advance notices received and allows the event owner to take one of the following actions.

- If **Source Again** is chosen, the event owner will be directed to re-source the event.
- If **Do Not Source** is chosen, the notice will be removed from the page.

Set Up Advance Notifications for Sourcing Director Contracts

An advance notification can be set up on a contract that was created from a sourcing event to inform the event owner in advance that a sourced contract is about to renew or expire. When that date occurs, a system email, notification and action item is sent to the event owner.

To set up an advance notification, the contract must be created from a sourcing event.

STEP-BY-STEP

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts** (or **Contracts Dashboard** if you have the appropriate permissions).

2. Search for and open the appropriate **sourcing event contract**.

3. In the left menu, select **Notifications**.
4. Under **Solicitation Advanced Notice**, enter the **number of days** prior to the contract end date that you want a notification sent to the event owner.

5. Click **Save Changes.**

Respond to Advance Notifications for Sourcing Director Contracts

As an **event owner**, you may receive notice that a contract created from a sourcing event is about to be renewed or expire. From the email, notification or action item you can choose to re-source the event or remove the notice.

You need **Event Owner** permissions to perform this task.

STEP-BY-STEP

1. From the email, notification or action item, navigate to the **Sourced Contract Advanced Notice** page.

2. Click the menu to the right of the item and choose one of the following actions:

- Select **Source Again** to be directed to re-source the event.
- Select **Do Not Source** to remove the notice from the page.

REFERENCE

CONTRACT PERMISSIONS

Note: Contact eMACS Support Unit for more information on contract permissions. Some contract permissions are available to system administrators only.

Here is an overview of the contract permissions you may need for setting up your system.

CONTRACT PERMISSIONS

- **Contract Configuration** - Allows users to manage general contract settings, contract types, contract number wheels and jurisdictions. For systems with CMR enabled, users can also manage contract projects.
- **Contract Administrator** - Allows users to manage all contracts. They can view contracts irrespective of a non-owner's Full, Limited or Partial visibility. They can view all contract reports.
- **Contract Manager** - Users with Contract Manager permission are able to manage only their own contracts. They may view others' contracts where the other owners have granted non-owners Full or Partial visibility, and they may view reports based on the same limitations.
- **Administer Projects** - Users with the Administer Projects permission are able to create new child projects inside of projects where they are assigned as "Project Administrators". Users must have Administer Projects permission in order to be added to a parent project as a "Project Administrator".
- **Manage Contract Obligations** - Users with the permission have write access on the Obligation Library page. This allows them to add, edit, and delete obligations in the obligation library.
- **Manage Custom Contract Fields** - Allows users to add, edit and delete custom contract fields on a contract type.
- **Manage Contract Templates and Clauses** - Used with Total Contract Manager only. Allows users to add, edit and delete clauses, templates and contracts in the SciQuest Contract Authoring for Word app.

Typically, there are three types of users who will need access to the Word app:

- Template administrators, who create and update clauses and templates.
- Users who need the ability to create a contract from a template and modify the language in that contract. These are usually contract managers or contract creators.
- Reviewers who need to make edits to the contract during the review process.
- **Contract Super User** - Allows users to use the "Contract CSV Import/Export" and "Contract Party Import/Export" features, search for and view all contracts even if they are set as confidential, and force check-in any contract. This permission does not duplicate the Contract Administrator permission but should be used to expand an administrator's abilities.
- **Manage Archived Contracts** - Allows users to archive contracts that are no longer in use. Contracts must be in Complete, Terminated or Superseded status.
- **Export Search Results** - Provides the ability to export information from the following sections: PR, PO, Receipts, Invoices, and Fulfillment POs. Once the export request is made, the user will have access to the Search Exports screen (located on the History tab) to view their own exports.
- **Manage Company Exports** - Allows a user to manage exports across an agency. They can see all exports and delete any export if necessary.

- **Manage Contract Request Templates** - Gives user access to Contract Request Templates under the Libraries menu.

- **Contract Requester** - Gives user access to the Request Contract and Manage Contract Requests pages.

- **Edit Party Contact on Contract** and **Edit Party Address on Contract** - Allows users to edit the contact and address information on a contract party. **Note:** If a user has the Manage Vendor Profiles permission, they do not need these permissions to edit contract party information, however, the Manage Vendor Profiles permission allows them to edit anything about the party's profile.

- **Extend Contract End Date** - Users with this permission can extend a contract's end date when the contract is in *Executed: In Effect*, *Executed: Future* or *Executed: Expired* status.

CONTRACT ACTIONS

Contract actions are tasks that can be performed on a contract. The Contract Actions button appears in the top right corner of contract screens. The options available in the drop down menu vary according to the status of the contract and your user permissions or role.

- **Amend** - Contract amendments are created when users need to update an approved contract, and the changes will affect the terms and conditions of the contract.

- **Approve** - Select to approve a contract.

- **Archive** - Allows you to archive contracts that are no longer in use. Contracts must be in Complete, Terminated or Superseded status. Archived contracts do not change status, but are hidden and cannot be seen in simple searches or the contracts dashboard, the Contracts tab of a vendor profile, the Contract Family page, or contract reports. You can search for archived contracts using an Advanced Search. Internal edits are not allowed on archived contracts. See *Un-Archive*.

- **Assign Contract Facilitator** - Allows a contract manager or contract administrator to give another contract manager or administrator temporary access to a contract prior to it reaching Executed: In Effect status. See *Reassign Contract Facilitator* and *Unassign Contract Facilitator*.

- **Assign to Myself** - Allows you to assign a contract approval task to yourself. This is used when a contract has been submitted for approval, and there are multiple users who could approve the contract. By assigning the task to yourself, you become owner of the approval task and it is removed from the shared approval folder. Select Return to Shared Folder to return the approval task to the shared folder.

- **Check In** and **Check Out** - Allows you to check in or check out a contract to prevent other users from modifying it while you are making changes. A lock icon () indicates that a contract is checked out. Pause your mouse over the icon to see who the contract is checked out to. Checking out a record gives you exclusive use of it, and is required to perform most contract actions. Once changes are complete, checking in the contract makes it available to other users for editing. A record is automatically checked out to the person who created it and must be checked in before it can be changed by another user, reviewed, or approved. See *Override Check Out*, below.

- **Check Out for Internal Edit** - Appears when a contract is in *Executed: In Effect* status and allows you to update information on approved contracts as long as the changes don't affect the terms and conditions of the contract. If the changes do affect the terms and conditions of a contract, you will need to create an amendment. You can edit the following pages during an internal edit:

- Header (limited fields only)

- Attachments (**Note:** Attachments are open for editing when performing an internal edit. This is to allow you to make **minor** changes to text that do not affect the terms and conditions of the contract. In the event of a discrepancy, the document of record is the signed version of the contract.)

- eProcurement Setup

- Budget and Spend
- Applies To
- Goods and Services
- PO Clauses
- Publish
- Users and Contacts
- Notifications
- Contract Family

- **Complete** - The contract has reached its scheduled end date and all steps required to close the contract have been done. The Complete action is typically used when a contract has reached its scheduled end date and has expired. Depending on your agency's configuration, this may be an automatic process that moves contracts to the Complete status when a contract's end date is reached, or it can be performed manually to indicate that you have finished invoicing against a contract and that it is inactive in the system. The Complete status can be reversed by selecting **Contract Actions > Return to Executed**.

- **Copy** - Allows you to copy an existing contract.

- **Create Invoice** - Allows you to create a non-PO invoice from a contract This option is only available for agencies using eProcurement.

- **Delete** - Allows you to delete contracts that are in Draft status. You can only delete contracts when they are in Draft status.

- **Download Full Contract as PDF** - Click to download a PDF version of the contract that includes the main document and all attachments that have "Print with Full Contract" selected.

- **Forward To** - Allows you to forward a contract that is in the approval workflow to another user.

- **Launch eSignature** - Available for systems using eSignature. The contract manager selects this option to send the contract to be signed electronically. The individuals indicated as signatories in the eSignature screen will receive an email notification that allows them to open the document from their email and sign it electronically. When they have finished signing the document, the contract returns to the regular workflow. If using manual signature field placement, the contract manager needs to place signature field placeholders on the document before sending it out for signature.

- **Override Check Out** - Allows users with the permission to take control of a contract that has been checked out to another user. This is used in cases where the user who has the contract checked out is not available and an action needs to be performed on the contract.

- **Place on Hold** - Appears when a contract is in the approval workflow and assigned to you as an approver. Allows users with the appropriate permission to place a contract on hold.

- **Reassign Contract Facilitator** - Allows a contract manager, contract administrator or contract facilitator to remove the contract facilitator designation from one individual and reassign it to a different contract manager or contract administrator to perform contract manager-related tasks on a contract prior to it reaching Executed: In Effect status. See also *Assign Contract Facilitator* and *Unassign Contract Facilitator*.

- **Renew** - You can renew a contract that has reached its end date, as long as the contract allows renewals and there are renewals remaining.

- **Return to Draft** - Appears when a contract is in the approval workflow. Allows users with the appropriate permission to return the contract to Draft status to make updates.

- **Return to Executed** - Appears when a contract is in Complete status. Allows you to return the contract to **Executed: In Effect** status.

- **Return to Shared Folder** - Appears on contracts where you have assigned a contract approval task to yourself, but there are multiple users who could approve the contract. Selecting this option returns the task to the shared approval folder, where another user can pick up the approval task.

- **Terminate** - Allows you to end a contract prior to its scheduled end date. A termination is used post- suspension when terms cannot be reached and the contract will not go forward. This is a final step. You can copy and print a terminated contract, but it **cannot** be returned to active status.

- **Un-Archive** - Allows you to return archived contracts to visibility in simple searches, the contracts dashboard, the Contracts tab of a vendor profile, the Contract Family page, and contract reports. See *Archive*.

- **Unassign Contract Facilitator** - Allows a contract manager, contract administrator or contract facilitator to remove the contract facilitator designation from an individual. See also Assign Contract Facilitator and Reassign Contract Facilitator.

- **Upload Fully Executed Contract** - Appears when a contract is in Out for Signature status. It indicates that the contract has been approved, but a signed copy of the contract has not been uploaded into the system. Click to upload a signed copy of the contract.

- **Version History** - Selecting Version History in any record will open up a screen that contains a log of all actions performed on the record.

You can view a history of changes made to a contract by clicking the **History** link in the top right corner of the screen.

OVERVIEW OF CONTRACT STATUSES

Here is a list of default statuses in TCM that reflect where a contract is in its lifecycle, or actions that can be performed on a contract.

Your system may show different statuses that have been configured specifically for your agency.

CONTRACT WORKFLOW STATUSES

- **Complete** - The contract has reached its scheduled end date and all steps required to close the contract have been done. The Complete action is typically used when a contract has reached its scheduled end date and has expired. Depending on your agency's configuration, this may be an automatic process that moves contracts to the Complete status when a contract's end date is reached, or it can be performed manually to indicate that you have finished invoicing against a contract and that it is inactive in the system. The Complete status can be reversed by selecting **Contract Actions > Return to Executed**.

- **Draft** - The contract is under construction and has not been submitted for approval.

- **eSignature Setup** - This applies to systems with eSignature enabled, Adobe Sign is the eSignature provider, and the contract is complete and in workflow. It indicates that "Yes" has been selected for the "Use eSignature for this contract?" question on the contract header and that the Manual - Placed by Contract Manager option is selected on the eSignature page of a contract, but the "Launch eSignature" contract action has *not* been selected. The contract manager needs to manually select **Launch eSignature** from the Contract Actions menu. They will be taken to the document in Adobe Sign where they can drag and drop signature placeholders from the top of the screen onto the document before sending the contract out for electronic signature.

- **Expired** - A contract is automatically marked as expired once its scheduled end date has passed.

- **Executed: Future** - The contract is approved, but will not be in effect until its scheduled start date.

- **Executed: In Effect**- The contract is approved and active.

- **External Review** - The contract draft is complete and is undergoing an external review by individuals who do not have access to the system.

- **Internal Review** - The contract draft is complete and is undergoing an internal review by users within the system.

- **Out for Signature** - This applies to systems using eSignature, where the contract is complete and in workflow. It indicates that "Yes" has been selected for the "Use eSignature for this contract?" question on the contract header, but the "Launch eSignature" contract action has *not* been selected. The contract manager must either manually select **Launch eSignature** from the Contract Actions menu to send the contract out for electronic signature OR manually upload a signed copy of the contract into the system and expedite the workflow step before the contract will move to the next step in the workflow.

- **Pending Approval** - The contract is complete and is moving through the approval workflow.

- **Pending Signature** - This applies to systems using eSignature, where the contract is complete and in workflow. It indicates that "Yes" has been selected for the "Use eSignature for this contract?" question on the contract header, and the contract has been sent to be signed electronically by selecting the "Launch eSignature" contract action.

- **Superseded** - The contract is an old version of a contract that is no longer in effect. It has been replaced with a newer version of the contract that is in the status "Executed: In Effect".

- **Terminated** - The contract has been stopped before its scheduled end date. A termination is used post- execution, when terms cannot be reached and the contract will not go forward. You can copy and print a terminated contract, but it **cannot** be returned to active status.